ASSOCIATED BUILDER'S AND CONTRACTORS, INC.

Training Department

Personify User Manual

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Viewing a Constituent's Contact Information

You can change the contact information for the customer, such as phone numbers, email addresses, and web pages. You can also add non-primary contact information and specify whether the added information should be included in the directory.

Customers Overview

In Personify, there are four types of constituents:

- Individual (I)
- Company (C)
- Committee (T)
- Subgroup (S)

These make up the different types of constituents that you can add to the Personify database.

Personify offers a variety of ways to view constituents, including:

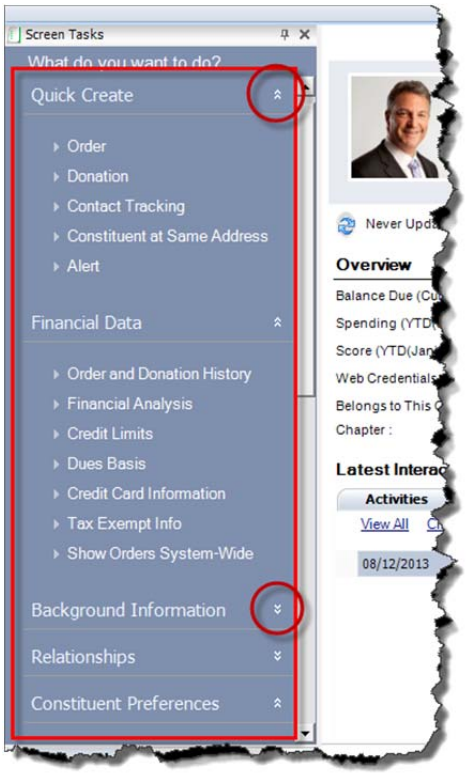
- **CRM360®** The new CRM360 will serve as your one-stop-shop for all essential customer data that is easy to update and maintain, including Financial Data, Background Information, Relationships, Preferences, and Involvement History.
- **Customer Central** The Customer Central screen is centered on inter-connected functions used to manage information concerning individuals, companies, subgroups, and committees. A unique customer number assigned to each record aggregates all other information in the system.
- **Committee Central** The Committee Central screen is a general setup application that displays information specific to committees. You can define the committee by name, class, structure, status, and various related details. Personify maintains a single central customer table that stores virtually unlimited information on all who do business with the association. A unique customer number assigned to each record aggregates all other information in the system. When a record is retrieved, all information about the committee displays.

Navigating CRM360®

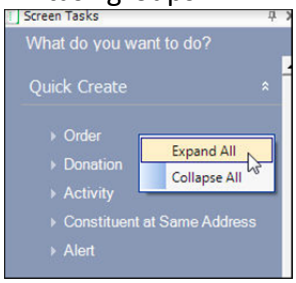
Using the various options available in the Screen Tasks menu, you can access multiple pages for entering and maintaining constituent data. The "Main Page" link on each page allows you to quickly return to the overview screen in CRM360.

Screen Tasks

Once you have opened a constituent record in CRM360, you can seamlessly access all constituent related data using the Screen Tasks navigation menu, highlighted below. Each task group can be expanded and collapsed by clicking the up and down arrow buttons, as shown below.



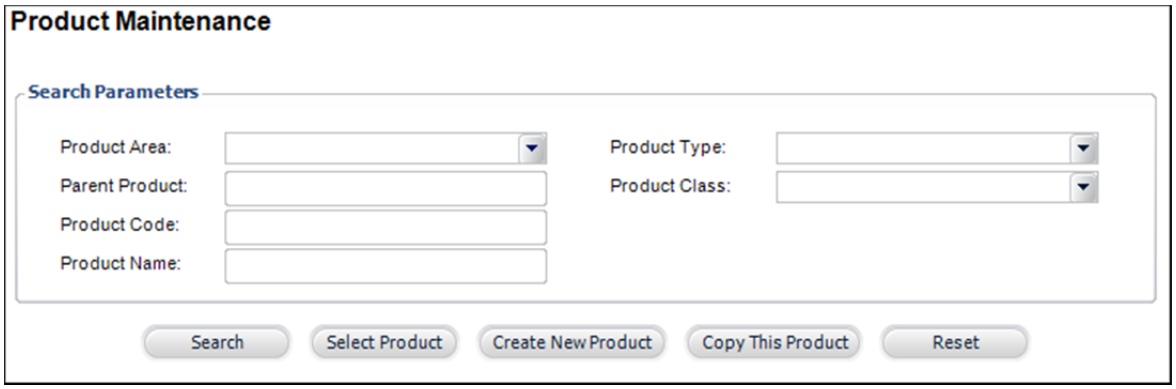
Additionally, right-click anywhere in the Screen Tasks menu to display the options to **Expand All** or **Collapse All** task groups.



Each section in the Screen Tasks menu is referred to in this documentation as "task categories". The tasks available are listed below, under each designated task category.

Search-Based Screens

All major screens start with a search page where you can search for records, as shown below. When the screen returns the search results, you can double-click to select a record you wish to view or edit. You can also click the record once and hit Select to perform the same action. The **Reset** button allows you to clear the search criteria and perform a new search.



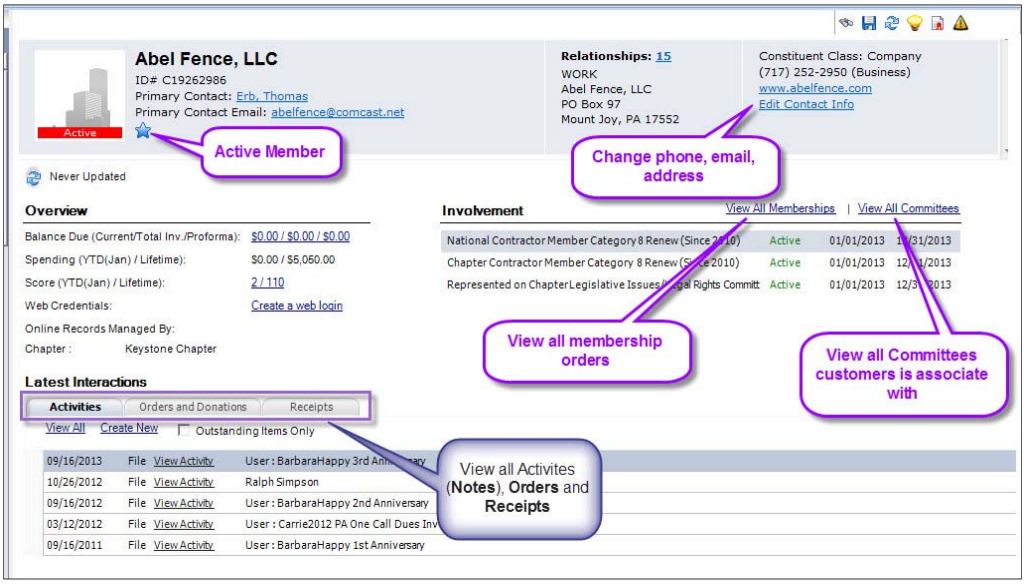
From every search screen, you also have the option to create a new item. For example, from the Product Maintenance screen shown above, you can search for and select an existing product or create a new product.

Enter as much information as possible to refine the search. If you enter a name in the Name fields, all of the clients/customers with the name entered will be returned.

When searching for names, the appropriate format is: Last;First;Middle;Prefix;Suffix;Credential. If you search by a state or an address, the system returns clients/customers whose primary address match the criteria entered.

Screen Elements

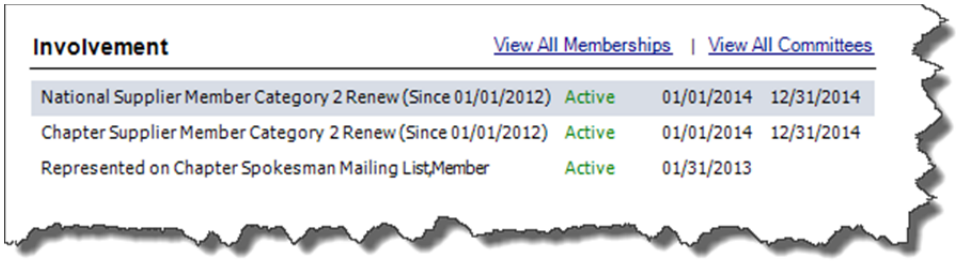
ACTIVE MEMBER


Abel Fence, LLC
ID# C19262986
Primary Contact: Erb, Thomas
Primary Contact Email: abelfence@comcast.net
Active
Active Member
Relationships: 15
WORK
Abel Fence, LLC
PO Box 97
Mount Joy, PA 17552
Constituent Class: Company
(717) 252-2950 (Business)
www.abelfence.com
Edit Contact Info
Change phone, email, address
Never Updated
Overview
Balance Due (Current/Total Inv./Proforma): $0.00 / $0.00 / $0.00
Spending (YTD(Jan) / Lifetime): $0.00 / $5,050.00
Score (YTD(Jan) / Lifetime): 2 / 110
Web Credentials: Create a web login
Online Records Managed By:
Chapter : Keystone Chapter
Involvement
View All Memberships | View All Committees
National Contractor Member Category 8 Renew (Since 2010) Active 01/01/2013
Chapter Contractor Member Category 8 Renew (Since 2010) Active 01/01/2013
Represented on Chapter Legislative Issues Committ Active 01/01/2013 12/31/2013
View all membership orders
View all Committees customers is associate with
Latest Interactions
Activities
Orders and Donations
Receipts
View All
Create New
Outstanding Items Only
09/16/2013 File View Activity User : BarbaraHappy 3rd Anniversary
10/26/2012 File View Activity Ralph Simpson
09/16/2012 File View Activity User : BarbaraHappy 2nd Anniversary
03/12/2012 File View Activity User : Carrie2012 PA One Call Dues Inv
09/16/2011 File View Activity User : BarbaraHappy 1st Anniversary
View all Activites (Notes), Orders and Receipts

ACTIVE INDIVIDUAL

Constituent's Involvement

The Involvement section on the CRM360 screen displays a constituent's current membership and committee involvement for the organization. The emphasis of this section is on current involvement, but if a constituent is not a member at present, historic data will be used to populate this area. The Involvement section displays up to five lines for the constituent.

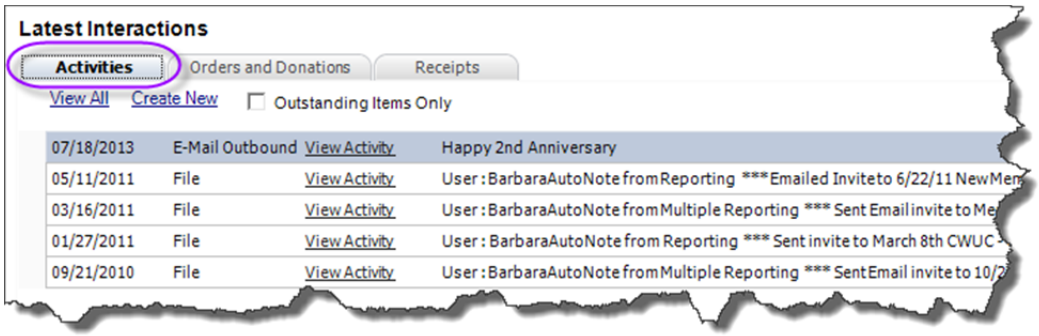

Involvement
View All Memberships | View All Committees
National Supplier Member Category 2 Renew (Since 01/01/2012) Active 01/01/2014 12/31/2014
Chapter Supplier Member Category 2 Renew (Since 01/01/2012) Active 01/01/2014 12/31/2014
Represented on Chapter Spokesman Mailing List,Member Active 01/31/2013

Latest Interactions

The Latest Interactions section of the CRM360 screen is a real-time snapshot of the five most recent interactions that the constituent had with the organization, including receipts, orders and donations, and contact tracking and activities. Please note that the records displayed are based on the creation date, not the date in which the item was last updated.

Activities

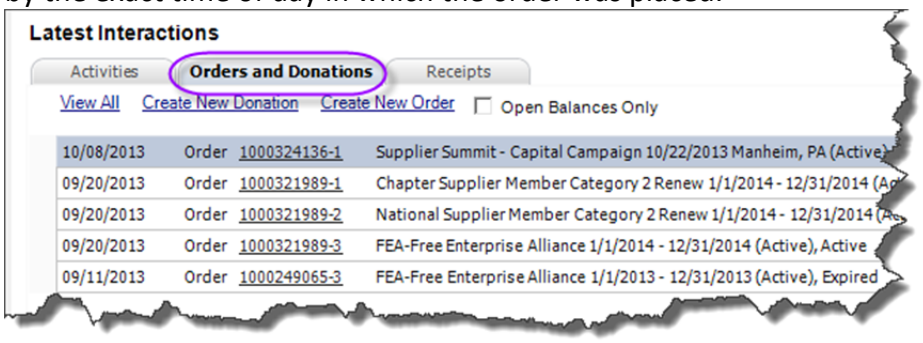
The Activities tab displays a list of the last five contact tracking records and activities in which this constituent is the owner of the record, the person contacted, or pertains to. The first column displays the date in which the activity was created. Activities created from Contact Tracking will display the Contact Type in the second column.


Latest Interactions
Activities
Orders and Donations
Receipts
View All
Create New
Outstanding Items Only
07/18/2013 E-Mail Outbound View Activity Happy 2nd Anniversary
05/11/2011 File View Activity User : BarbaraAutoNote from Reporting *** Emailed Invite to 6/22/11 New Me
03/16/2011 File View Activity User : BarbaraAutoNote from Multiple Reporting *** Sent Email invite to Me
01/27/2011 File View Activity User : BarbaraAutoNote from Reporting *** Sent invite to March 8th CWUC
09/21/2010 File View Activity User : BarbaraAutoNote from Multiple Reporting *** Sent Email invite to 10/2

Click the **View Activity** link to open the items in the Activity and Contact Tracking screen. Please note that system activities will open in a modified version of the Activity and Contact Tracking screen.

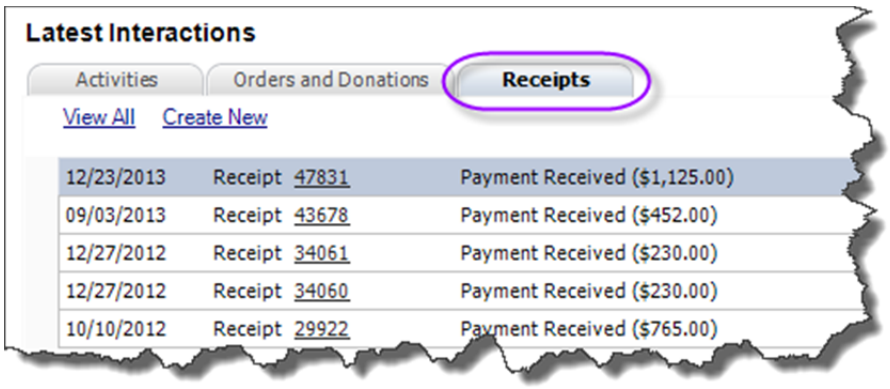
Orders and Donations

The Orders and Donations tab displays a list of the last five orders and donations in which this constituent is the bill-to or ship-to. If more than five orders occurred on a particular day, please click the **View All** link to open the Order and Donation History screen below the header in CRM360 to display all orders because orders are not sorted by the exact time of day in which the order was placed.


Latest Interactions
Activities
Orders and Donations
Receipts
View All
Create New Donation
Create New Order
Open Balances Only
10/08/2013 Order 1000324136-1 Supplier Summit - Capital Campaign 10/22/2013 Manheim, PA (Active)
09/20/2013 Order 1000321989-1 Chapter Supplier Member Category 2 Renew 1/1/2014 - 12/31/2014 (Ac
09/20/2013 Order 1000321989-2 National Supplier Member Category 2 Renew 1/1/2014 - 12/31/2014 (A
09/20/2013 Order 1000321989-3 FEA-Free Enterprise Alliance 1/1/2014 - 12/31/2014 (Active), Active
09/11/2013 Order 1000249065-3 FEA-Free Enterprise Alliance 1/1/2013 - 12/31/2013 (Active), Expired

Receipts

The Receipts tab displays a list of the last five receipts in which this constituent is the pay-to or bill-to. Click the **View All** link to open the Receipt Review search screen displaying a list of all receipts for the constituent. Click on the hyperlinked receipt number to open the item in the Receipt Review screen. The description of the receipt will display "Payment Received" and then the actual currency and appropriate symbol for the receipt. Click the **Create New** link to open the Receipt Entry screen.



Quick Create

- **Order** – opens the Order Entry screen in a new screen tab to create a new order for the constituent.
- **Activity** - opens the Contact Tracking screen in a new screen tab to create a new contact tracking activity for the constituent.
- **Constituent at Same Address** - opens the Shared Customer Address window to add a constituent at the same address as the constituent open in CRM360.
- **Alert** - opens the Alert Message window to add/edit/delete an alert on the constituent's record in CRM360.

Financial Data

- **Order and Donation History** - opens the Order and Donation History screen below the header within CRM360.
- **Financial Analysis** - opens the Customer Financial Analysis screen in a new screen tab.
- **Show Orders System-Wide** - opens the Global Orders across the Organization screen in a new screen tab.

Background Information

- **Activity and Contact Tracking** - opens the Activity and Contact Tracking screen below the header within CRM360.

- **Contact Information** - opens the Contact Information screen below the header within CRM360.
- **Demographics -** opens the Individual Information or Company Information screen depending on the constituent class below the header within CRM360.
- **Education** - opens the Education screen below the header within CRM360.
- **Attached Files** - opens the Resume/Related Documents screen below the header within CRM360.
- **Biography** - opens the Biography screen below the header in CRM360.
- **Segmentation Details** - opens the Segmentation Control screen in a new screen tab.
- **Name Details** - opens the Individual Name Edit or Company Name Edit window depending on the constituent class.
- **Miscellaneous Comments** - opens the Miscellaneous Comments screen below the header within CRM360.
- **Notification Messages** - as of 7.5.0, opens the Search Notification Sent Messages screen in a new screen tab, filtered to display notification messages sent to the constituent open in CRM360.

Relationships

- **All Relationships** - opens the Relationships screen below the header within CRM360.
- **Add a Family Member** - (individual only) opens the Shared Customer Address window to add a family member at the same address as the constituent open in CRM360. Please note that this does NOT create a family relationship between the two constituents.
- **Add an Employee** - (company only) opens the Shared Customer Address window to add an employee at the same address as the constituent open in CRM360. Please note that this does NOT create a family relationship between the two constituents.
- **Primary Family Contact** - opens the Family Relationships screen in a new screen tab.

Constituent Preferences

- **Opt-In/Opt-Out** - opens the Opt-In/Opt-Out Selections screen below the header within CRM360.
- **Special Interests** -opens the Special Interests screen below the header within CRM360.
- **Lists** - opens the Lists screen below the header within CRM360.

Involvement History

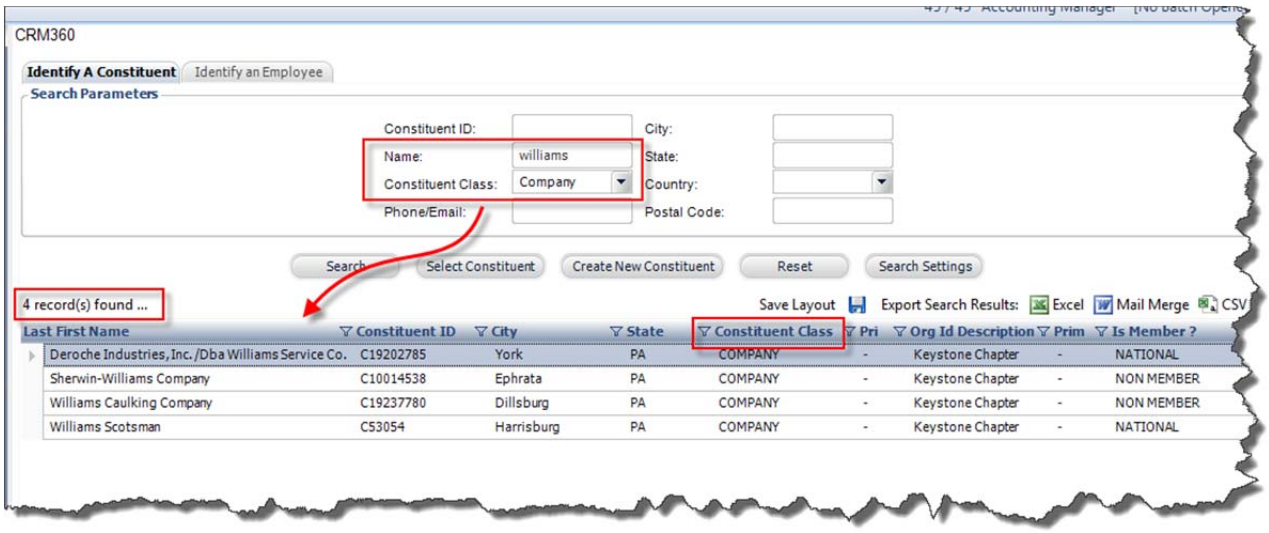
- **Membership** - opens the Membership Participation screen below the header within CRM360.
- **Committees** - opens the Committee Participation screen below the header within CRM360.

Reports

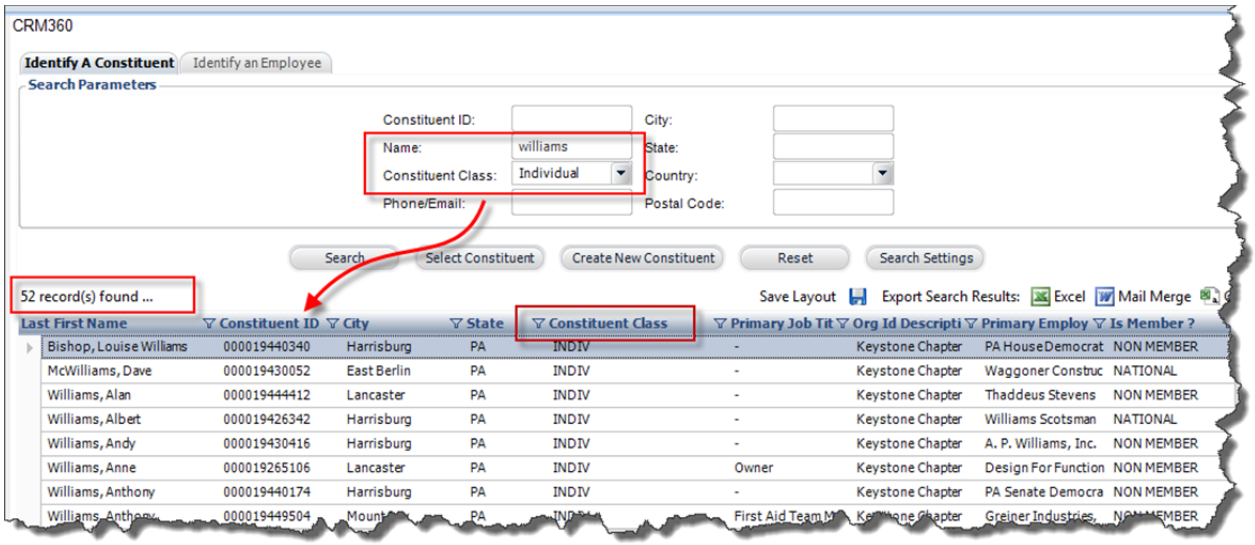
- **Membership Certificate (MBR9011):** opens the Online Report Submission screen in a new screen tab in order to print the constituents' membership certificate.

Find a Customer

1. From the **Home Page**, click **Find a Customer**.
2. Perform the customer search by using either criteria; Name, Customer Class, etc.

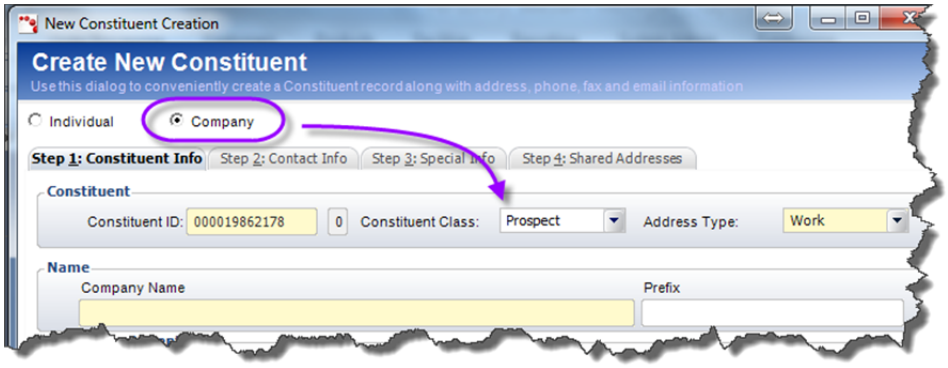

CRM360
Identify A Constituent
Identify an Employee
Search Parameters
Constituent ID:
Name: williams
Constituent Class: Company
Phone/Email:
City:
State:
Country:
Postal Code:
Search
Select Constituent
Create New Constituent
Reset
Search Settings
4 record(s) found ...
Save Layout
Export Search Results: Excel Mail Merge CSV
Last First Name | Constituent ID | City | State | Constituent Class | Pri | Org Id Description | Prim | Is Member ?
Deroche Industries, Inc./Dba Williams Service Co. | C19202785 | York | PA | COMPANY | - | Keystone Chapter | - | NATIONAL
Sherwin-Williams Company | C10014538 | Ephrata | PA | COMPANY | - | Keystone Chapter | - | NON MEMBER
Williams Caulking Company | C19237780 | Dillsburg | PA | COMPANY | - | Keystone Chapter | - | NON MEMBER
Williams Scotsman | C53054 | Harrisburg | PA | COMPANY | - | Keystone Chapter | - | NATIONAL

To search for co mpanies, enter Company in the Customer Class field; in addition to searching the Name field.


CRM360
Identify A Constituent
Identify an Employee
Search Parameters
Constituent ID:
Name: williams
Constituent Class: Individual
Phone/Email:
City:
State:
Country:
Postal Code:
Search
Select Constituent
Create New Constituent
Reset
Search Settings
52 record(s) found ...
Save Layout
Export Search Results: Excel Mail Merge
Last First Name | Constituent ID | City | State | Constituent Class | Primary Job Tit | Org Id Descripti | Primary Employ | Is Member ?
Bishop, Louise Williams | 000019440340 | Harrisburg | PA | INDIV | - | Keystone Chapter | PA House Democrat | NON MEMBER
McWilliams, Dave | 000019430052 | East Berlin | PA | INDIV | - | Keystone Chapter | Waggoner Construc | NATIONAL
Williams, Alan | 000019444412 | Lancaster | PA | INDIV | - | Keystone Chapter | Thaddeus Stevens | NON MEMBER
Williams, Albert | 000019426342 | Harrisburg | PA | INDIV | - | Keystone Chapter | Williams Scotsman | NATIONAL
Williams, Andy | 000019430416 | Harrisburg | PA | INDIV | - | Keystone Chapter | A. P. Williams, Inc. | NON MEMBER
Williams, Anne | 000019265106 | Lancaster | PA | INDIV | Owner | Keystone Chapter | Design For Function | NON MEMBER
Williams, Anthony | 000019440174 | Harrisburg | PA | INDIV | - | Keystone Chapter | PA Senate Democra | NON MEMBER
Williams, Anthony | 000019449504 | Mount | PA | | First Aid Team M | Keystone Chapter | Greiner Industries, | NON MEMBER

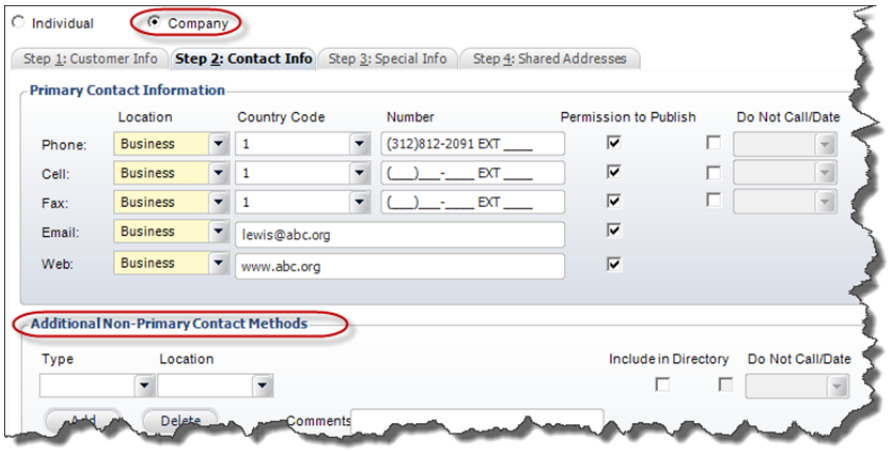
Add a New Company

1. From the **Page Home, c**lick **Add a New Customer**.
2. Select the **Company** radio button
3. Complete **Step 1: Constituent Info**. Select a **Customer Class** such as *Sponsor*, *Prospect*, *Vendor,* etc.



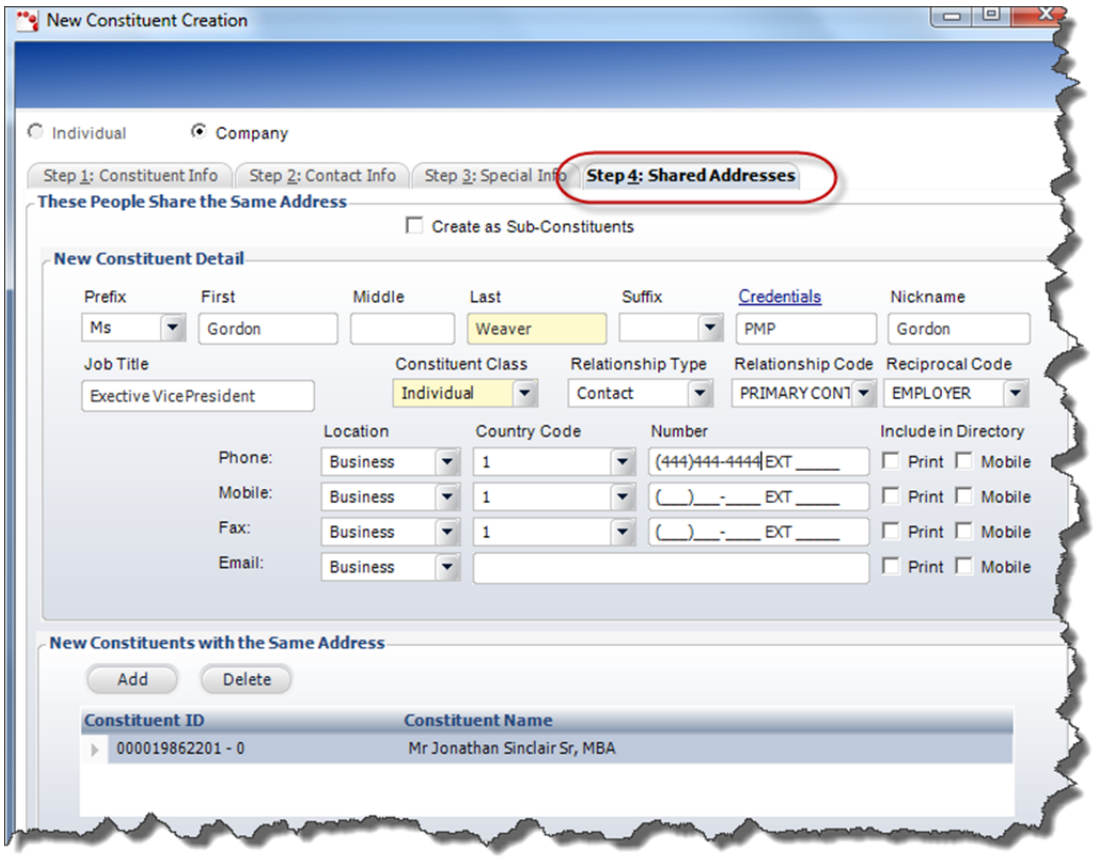
Customer Class is used ONLY for reporting purposes, it does not function as your Status field did in Access.

4. Enter the new company's address.
5. Click **Next** to complete **Step 2: Contact Information**.



6. Click **Next** twice to complete **Step 3: Shared Addresses.** Shared addresses enable you to add all employees while creating the company, employee will also inherit the company address.

Additional contact methods enables you to add more than one phone, email, for company.



To view all employees, click the Relationship link from the profile screen.

7. Click **Save and Close**.

Add a New Subsidiary

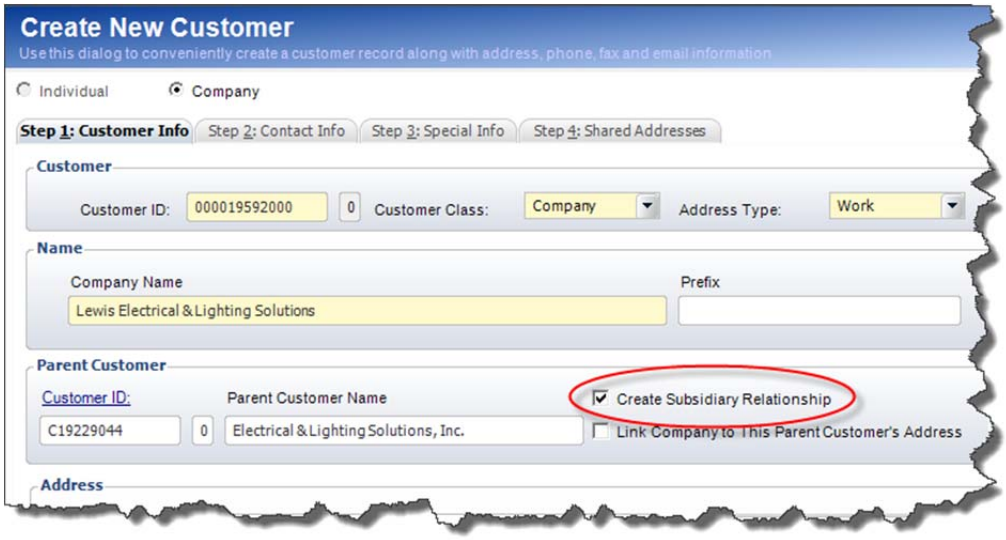
For chapters with branch offices, you will need to link all branches to the parent company; doing so will enable your branch members to get member pricing on all orders.

1. Click **Add new customer** and select **Company**
2. Customer class is Company, you can change to Branch.

   the customer class in Personify is simply a distinction and beneficial for searching and reporting; this does not make your customers branch members; this is done by Parent/Subsidiary relationship.

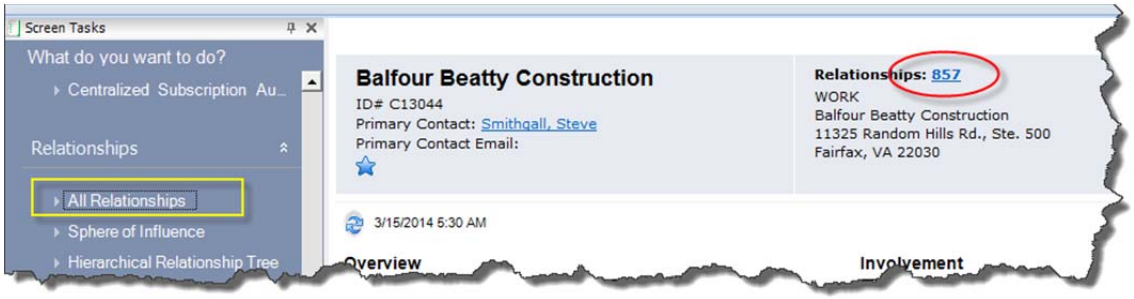
3. For the Parent Customer, click the **Customer ID** link and search for the parent company
4. Check **Create Subsidiary Relationship**
5. Uncheck Link Company to this Parent Address

   Parent/Subsidiary relationship is a must, this is how they become a member with member pricing. There is no need to link address, as your branch has their own address.

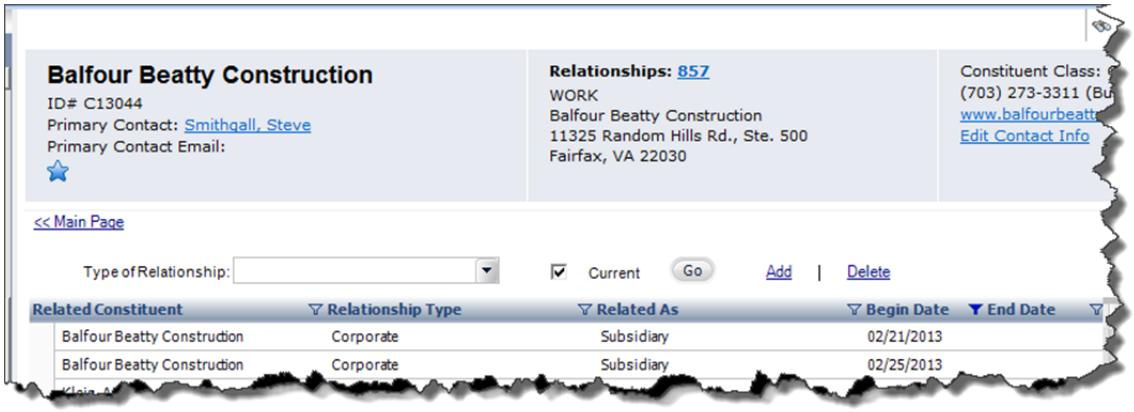


Create Subsidiaries from Existing Customer

1. Open the constituents profile; click **All Relationships** from the Relationships task category. Additionally, you can click the **Relationships: link** within the header.



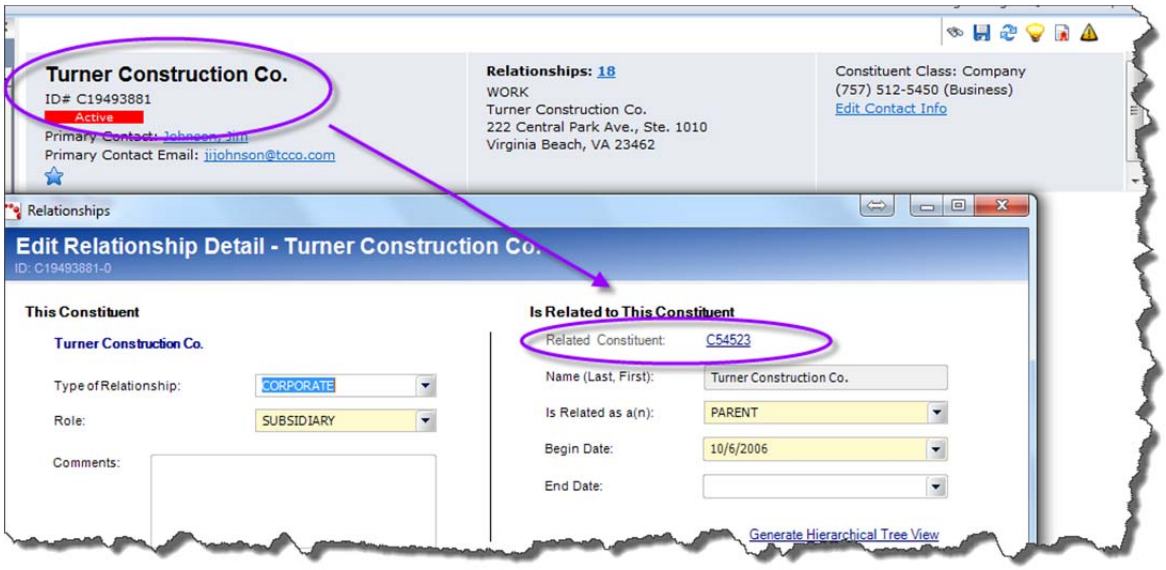
2. Click Add from the relationship screen.



3. Complete the fields for **This Constituent**:
   a. the Type of Relationship will be **Corporate**

b. the Role is **Subsidiary**.

4. Complete the fields **for Is Related to This Constituent**
   a. click the Related Constituent link to search for the **Parent** member

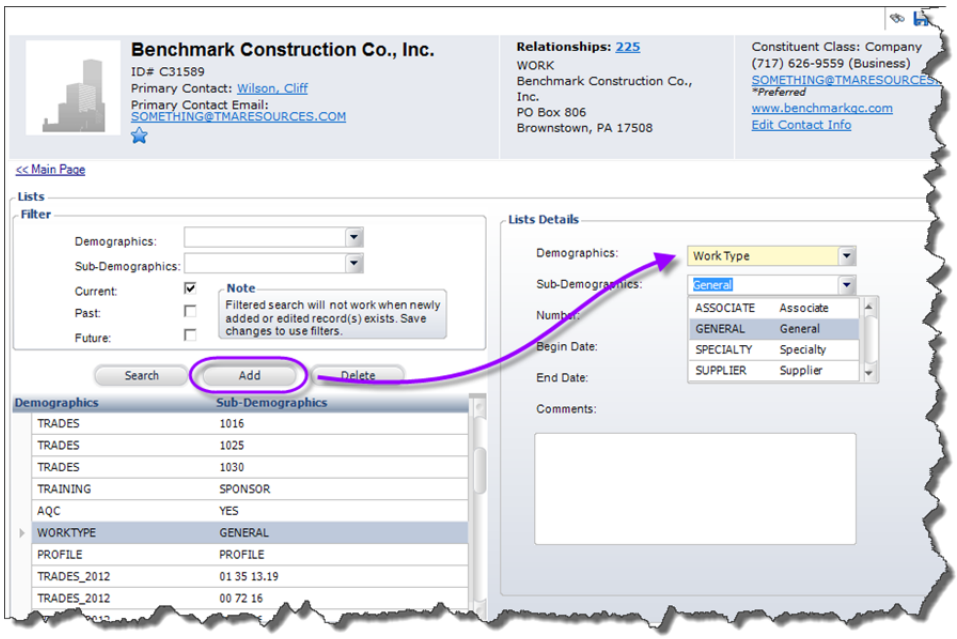


If the Subsidiary ends membership, enter an End Date

Add Company Demographics

Add Trade Codes, AQC, Work Type, etc.

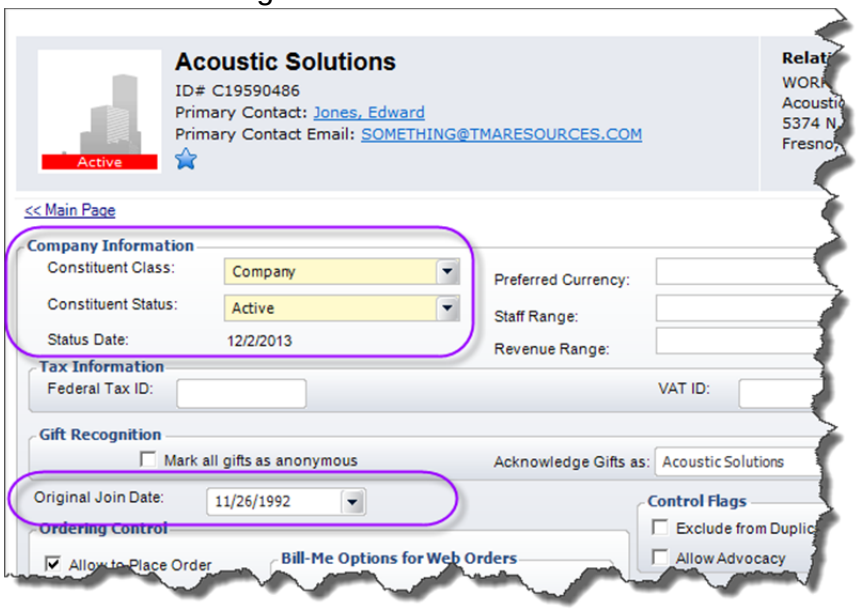
1. From constituents CRM screen, click **List** under **Constituent Preferences** task category.
2. Below the Filter area you will find all demographics on your customer
3. Highlight a demographic and view additional information from the right side under List Details.
4. The **Sub-Demographics** will list the CSI code for the trade.



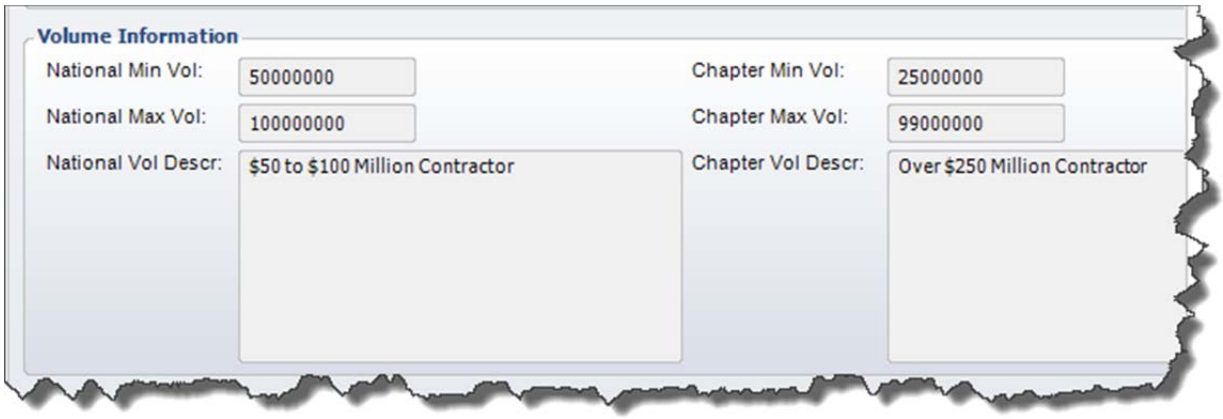
Viewing/Changing Additional Demographics

From the **Background Information** task category in CRM360, click **Demographics**. To view Constituent Class, Constituent Status, Member Original Join Date and Volume.

Add or View Join Original Date



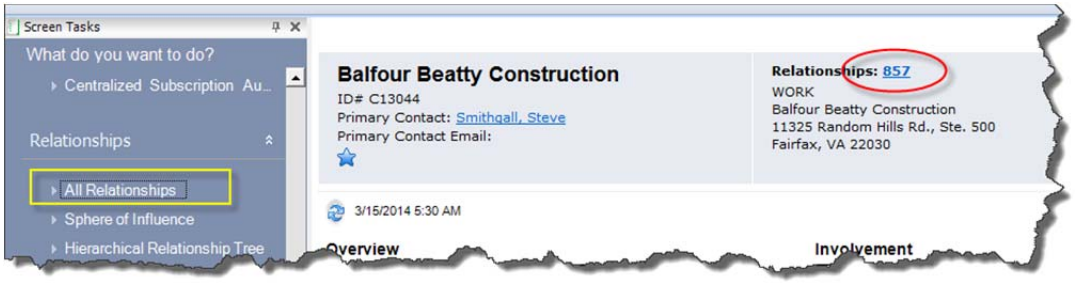
Add or View Volume



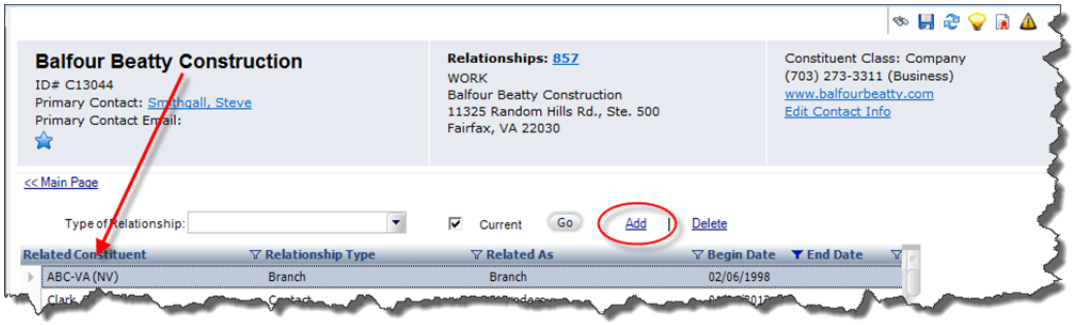
Relating Members to a Chapter Branch

For chapters with branch offices, you will need to link all members to the branch.

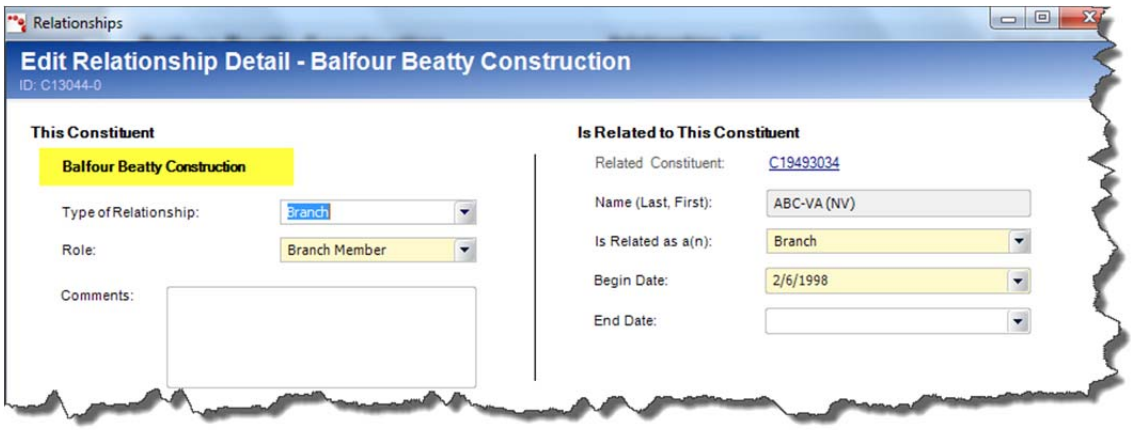
1. Open the constituents profile; click **All Relationships** from the Relationships task category. Additionally, you can click the **Relationships: link** within the header.



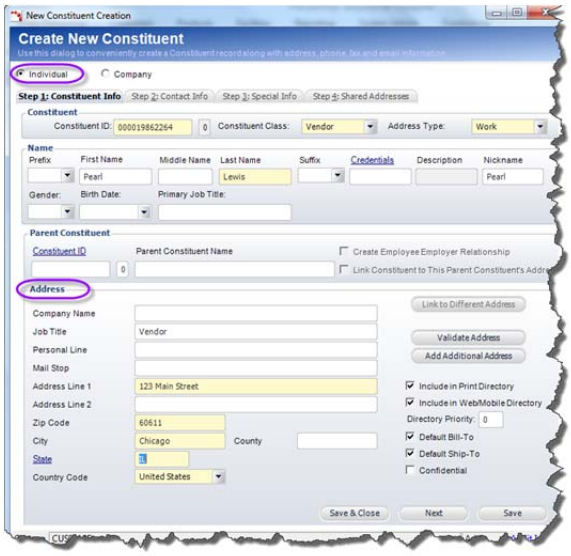
2. Click **Add** from the relationship screen.



3. Complete the fields for This Constituent:
    a. the **Type of Relationship** will be **Branch**
    b. the **Role** is **Branch Member**.
4. Complete the fields for Is Related To
    a. click the **Related Constituent** link to search for the chapter branch office



Add a New Individual



You may want to add individuals to your AMS that has no relationships, nor links to your existing constituents. For example, you may want to add a vendor or sponsor.

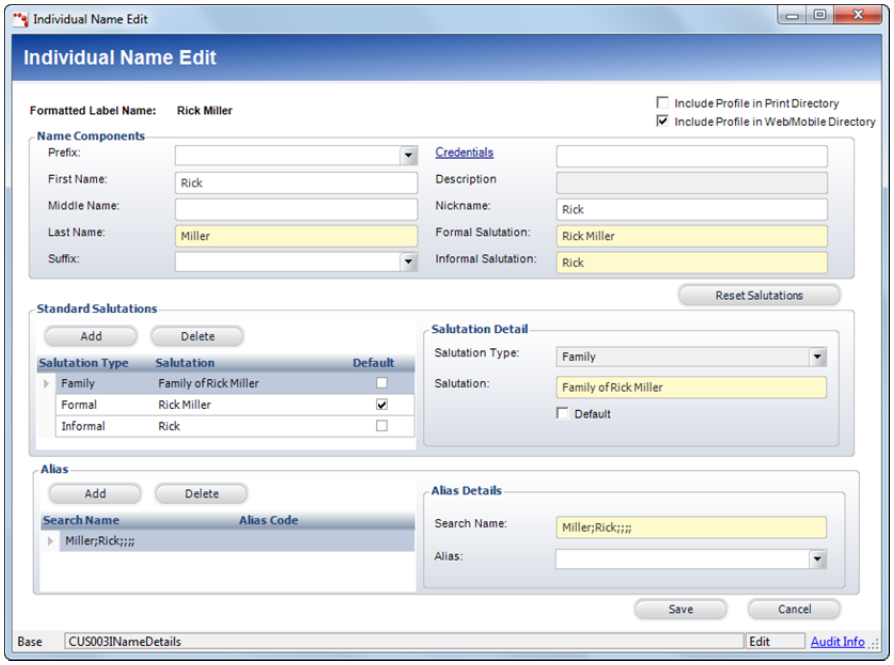
1. From the **Home Page**, select **Add a new customer** > **CRM360** > **Create New Constituent**.
2. From the **Step 1: Constituent Info** tab, fill out the Constituent, Name and Address fields.
3. Click Next
4. From the **Step 2: Contact Information** tab, complete all necessary fields.
5. Click Save & Close.

By default, Individual is selected and a Constituent ID is assigned.

Individuals salutation

Using the Salutations section of the **Individual Name Edit** screen, you can add standard salutations for the customer to use.

1. From the **Background Information** task category in CRM360, click **Name Details**.
2. The Individual Name Edit screen displays, as shown below.



1. From the Standard Salutations section, perform the following:
   a. Click **Add**.
   b. Select the **Salutation Type** from the drop-down menu.
   c. Enter the **Salutation** name to be used on mailings, invoices, and notifications.
   d. Check the **Default** checkbox if this is the default salutation to be used on all mailings, invoices, and notifications.
   e. Click **Save**.

Only one salutation can be selected as the default.

The salutation options include the following:

Formal	This salutation is created automatically by the system when the constituent is created. If the constituent has a gender defined on the Demographics screen, the formal salutation will default to "[Prefix] [Last Name]". For example, if constituent John Smith has a Gender of "Male", the formal salutation would be "Mr Smith". If the constituent does NOT have a gender defined, the formal salutation will default to [First Name][Last Name].
Informal	This salutation is created automatically by the system when the constituent is created and defaults to the constituent's [First Name]. For example, John Smith's information salutation would be "John".
Family	This salutation is created automatically by the system when the constituent is created and defaults to "Family of [First Name][Last Name]". For example, John Smith's family salutation would be "Family of John Smith".
Formal Spouse	If a spouse has been defined for the constituent in the "Spouse First Name" field on the

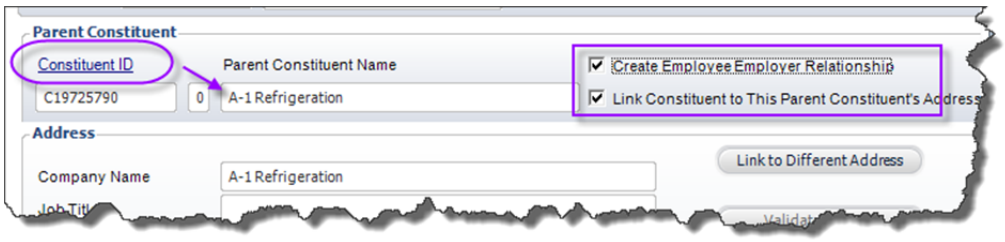
	Demographics screen, the system will automatically create the formal spouse salutation as "Mrs. [Last Name]". For example, if the Spouse First Name field is defined for John Smith's, the formal spouse salutation would be "Mrs. Smith".
	If the constituent's prefix is "Dr.", the formal spouse salutation will be "Dr. [Last Name]".
Informal Spouse	If a spouse has been defined for the constituent in the "Spouse First Name" field on the Demographics screen, the system will automatically create the formal spouse salutation as "[Spouse First Name]". For example, if John Smith's Spouse First Name is "Jane", the informal spouse would be "Jane".
Formal with Spouse	If a husband/wife relationships has been defined on the Relationships screen, the system will automatically create the formal with spouse salutation as "[Prefix] and Mrs. [First Name][Last Name]". For example, if John Smith has a husband/wife relationship defined, the formal with spouse salutation would be "Mr. and Mrs. John Smith".
Informal with Spouse	If a husband/wife relationships has been defined and the Spouse First Name field has been defined on the Relationships screen, the system will automatically create the informal with spouse salutation as "[husband First Name] and [Spouse First Name][Last Name]. For example, if the Spouse First Name of "Jane" is defined for a husband/wife relationship with John Smith, the informal with spouse salutation would be "John and Jane Smith".

These salutations display on mass email exports (such as FND630 and MKT800), printed acknowledgement letters (such as ORD660), notifications, and duplicate merges (CUS595).

Add a New Employee

1. From the **Home Page**, select **Add a new customer** > **CRM360** > **Create New Constituent**.
2. From the **Step 1: Constituent Info** tab, fill out the Constituent and Name fields
3. From the **Parent Constituent** section:
   a. Click the **Constituent ID** link and search for a company.
   b. Check the **Create Employee Employer Relationship** box
   c. Check the **Link Constituent to This Parent Constituent's Address** box; this gives the employee the same address as the company.

   If you selected a parent constituent, select the **Create Employee Employer Relationship** checkbox to create an Employment relationship**.** *This creates a relationship link to the company and gives employees member pricing on all orders.*
4. From the **Step 2: Contact Information** tab, complete all necessary fields.
5. Click **Save & Close**.

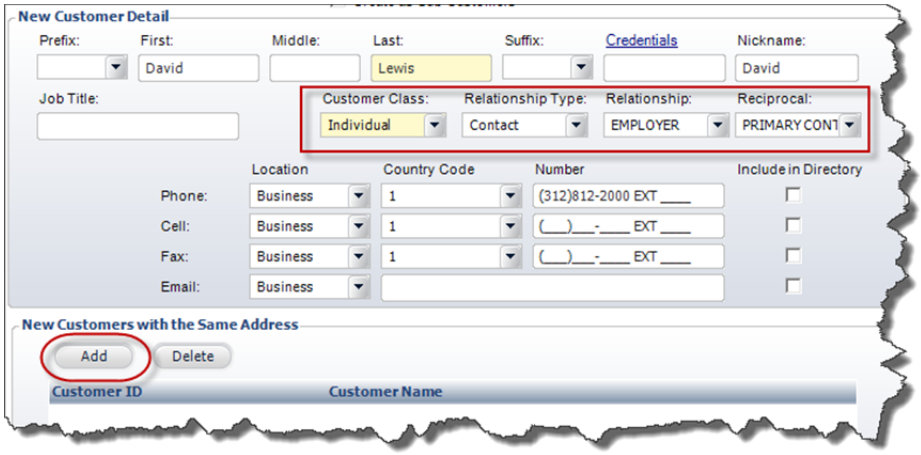


Create Additional Relationships

From a constituent profile screen, you can create additional relationships to a company. You may want to designate an employee that is also a primary contact, safety contact, a beam club sponsor, or an educational contact.

1. From the **Quick Create** task category, click **New Employee**. Additionally, from the **Relationship** task category, click **Add an Employee**.
2. The Shared Customer Address window displays, complete necessary fields.
3. The **Relationship Type**, **Relationship** and **Reciprocal** determine the type of contact relationship an employee has with the company.

If an employee has more than one role in a company, they should be listed more than once witin the Relationship window. See Viewing a constituents relationship below.



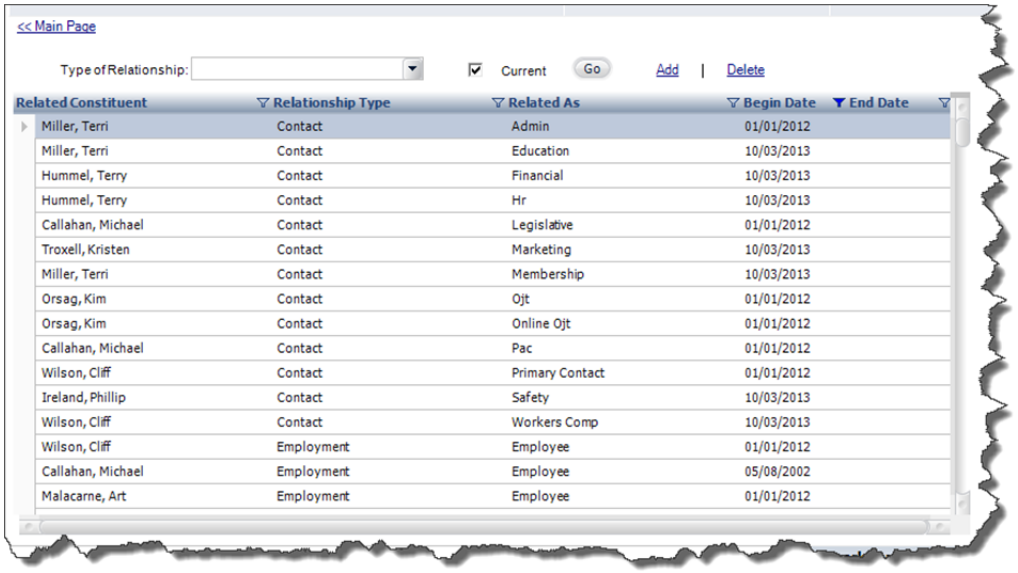
Viewing a Constituent's Relationships in CRM360®

From the Relationships task category in CRM360, click **All Relationships**. The Relationships screen displays a list of relationships defined for the constituent. To filter the records, select a **Type of Relationship**, which are defined on the Relationships Maintenance screen. Additionally, uncheck the **Current** checkbox and click **Go** to display past and future relationships.

1. Click the **Add** link to open the Relationships window to create a new relationship. Click the **Delete** link to delete the selected record in the grid.

Deleting a relationship record will remove the entire history of the relationship. Alternatively, double-click the record to select an End Date.

2. Double-click a record in the grid to open the Edit Relationship Detail screen. Click the **Main Page** link to return to the overview page.



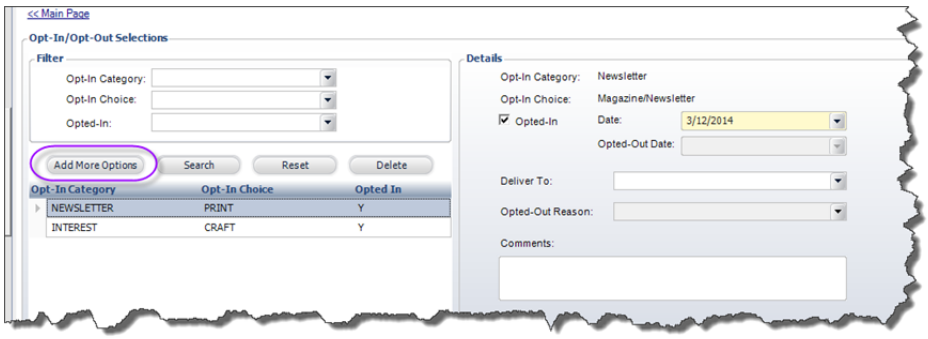
Related Constituent	Relationship Type	Related As	Begin Date	End Date
Miller, Terri	Contact	Admin	01/01/2012	
Miller, Terri	Contact	Education	10/03/2013	
Hummel, Terry	Contact	Financial	10/03/2013	
Hummel, Terry	Contact	Hr	10/03/2013	
Callahan, Michael	Contact	Legislative	01/01/2012	
Troxell, Kristen	Contact	Marketing	10/03/2013	
Miller, Terri	Contact	Membership	10/03/2013	
Orsag, Kim	Contact	Ojt	01/01/2012	
Orsag, Kim	Contact	Online Ojt	01/01/2012	
Callahan, Michael	Contact	Pac	01/01/2012	
Wilson, Cliff	Contact	Primary Contact	01/01/2012	
Ireland, Phillip	Contact	Safety	10/03/2013	
Wilson, Cliff	Contact	Workers Comp	10/03/2013	
Wilson, Cliff	Employment	Employee	01/01/2012	
Callahan, Michael	Employment	Employee	05/08/2002	
Malacarne, Art	Employment	Employee	01/01/2012	

The following columns displays in the relationships grid:

- ✓ **Related Constituent:** displays the constituent to which the constituent you're viewing is related.
- ✓ **Relationship Type:** displays the type of relationship between the related constituent and the constituent you're viewing.
- ✓ **Related As:** displays the role of the related constituent to the constituent you're viewing
- ✓ **Begin Date:** displays the date in which the relationship began.
- ✓ **End Date:** display the date in which the relationship ended.

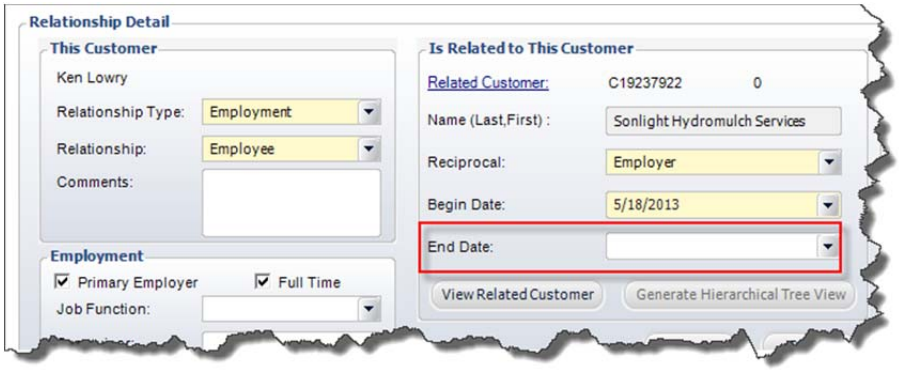
End Dating an employee Relationship

1. Search for the individual.
2. From the **Relationship** task, select **View All Relationships**.
3. Locate and highlight employee, from the **Relationship Detail** area, fill in an **End Date**.



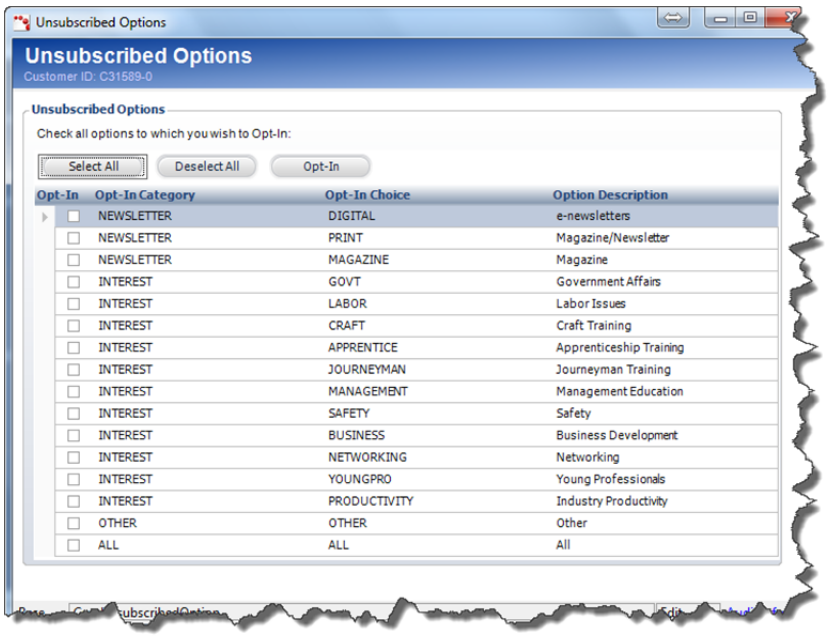
This does not delete the employee from the company, it simply hides the employee if the Current checkbox is selected; and keeps the record for historical puporses.

IF AN EMLOYEE NO LONG WORKS AT COMPANY, AFTER END DATING EMPLOYEMENT, YOU SHOULD MARK THE OLD ADDRESS AS "BAD" AND ENTER THE NEW PRIMARY ADDRESS AND SAVE IT.



Add Opt-in Preferences

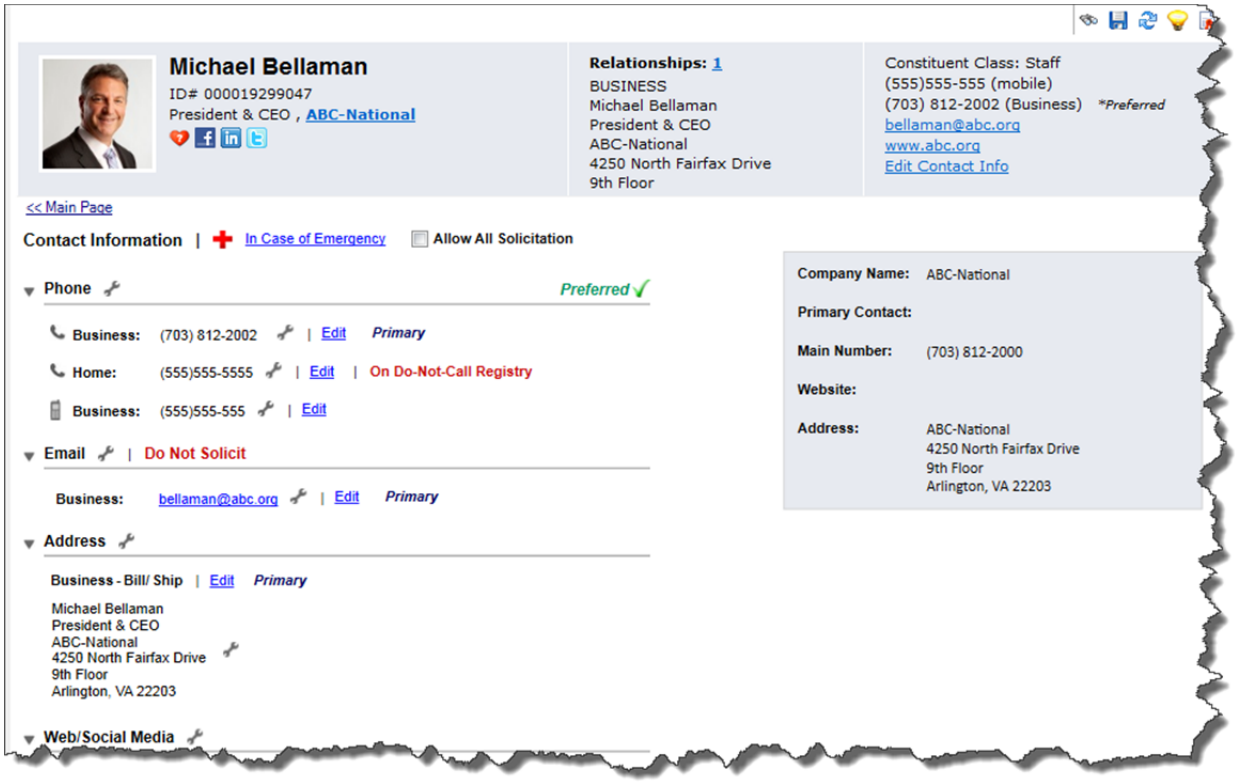
1. From constituents CRM screen, click **Opt-in** under **Constituent Preferences** task category.
2. Click **Add More Options** button
3. The Unsubscribed Options window appears.
4. Check one or more category you'd like to opt the constituent in to.



When running the CUS9001s marketing report, you will only see the categories you've opted the constituent into.

Viewing a Constituent's Contact Information

You can change the contact information for the customer, such as phone numbers, email addresses, and web pages. You can also add non-primary contact information and specify whether the added information should be included in the directory.



The Contact Information screen is broken down by the following categories, which will display regardless of whether or not a record has been defined:

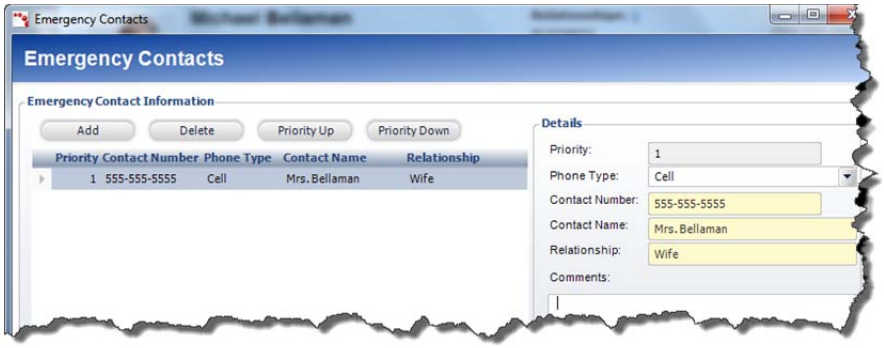
- **Phone** - only one phone number can exist with the same ***Type*** and ***Location***.
- **Email** - from this section, email addresses defined for the constituent will display as a hyperlink. You can click the email address link to open a blank **Outlook email** or your default email client.
- **Address** - when a constituent is first added to Personify, the address added at the time of creation is the constituent's default bill-to/ship-to address on all orders. If necessary, additional addresses can be added and this can be changed. ***Only one address can be marked as primary***.
- **Web/Social Media** - from this section, web site addresses defined for the constituent will display as a hyperlink. You can click the web site address link to open the web site directly in a browser.
- **Fax**

- **Domain**- you can enter a company's name as a registered domain. On the web, group managers are able to manage individuals with the Domain that the staff member assigns them to. *This is beneficial for when we move to an e-commerce environment, later on.*

Emergency Contact

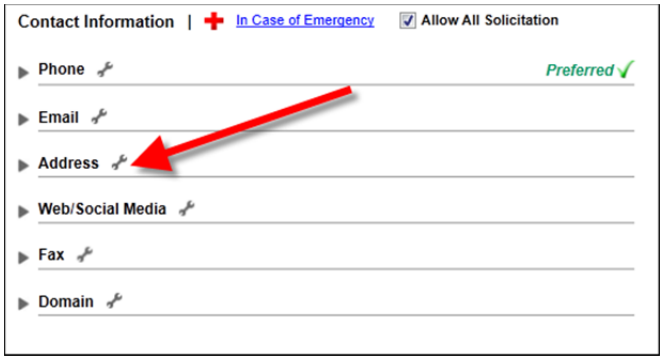
Additionally, you can define a constituent's emergency contact from this screen.

1. To access a constituent's contact information, click **Edit Contact Information** link.
2. Click the **In Case of Emergency** link.

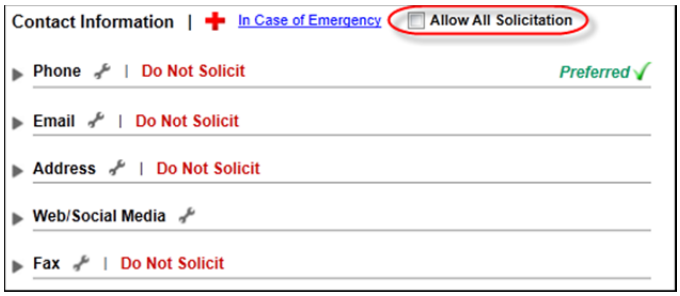


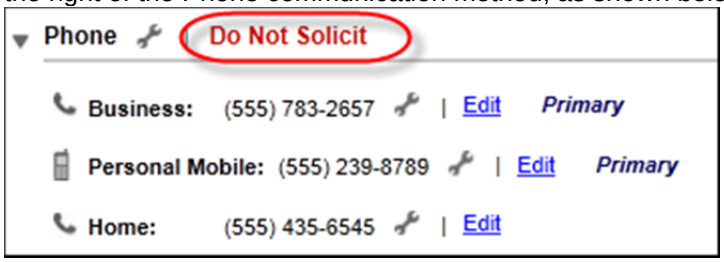
Communication Method Options

From the Contact Information section, you can perform the following actions by using the **wrench** icon at the communication method level.

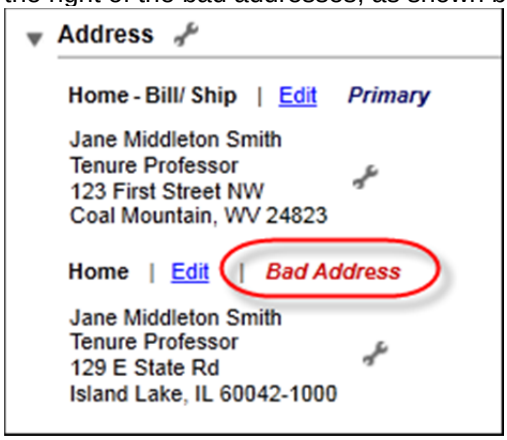


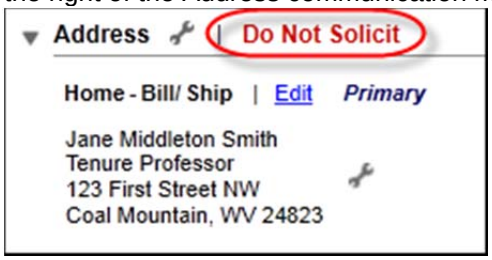
If the constituent does not under any circumstance want to be solicited in any communication method, uncheck the Allow All Solicitation checkbox. Doing so will add "Do Not Solicit" in right text to the right of each communication method, as shown below.


Contact Information | In Case of Emergency Allow All Solicitation
Phone | Do Not Solicit Preferred
Email | Do Not Solicit
Address | Do Not Solicit
Web/Social Media
Fax | Do Not Solicit

Action	Description	Communication Method(s)
CONTACT INFORMATION LEVEL WRENCH		
Add New	From the Phone section, this link opens the Contact Method Details window to add a new phone number. From the Email section, this link opens the Contact Method Details window to add a new email address. From the Address section, this link opens the Add Additional Customer Address window to add a new address. From the Web/Social Media section, this link opens the Contact Method Details window to add new web/social media information. From the Fax section, this link opens the Contact Method Details window to add a new fax number. From the Domain section, this link opens the Contact Method Details window to add a new Domain.	Phone Email Address Web/Social Media Fax Domain
Mark as Preferred	Of the five types of communications methods (Phone, Email, Address, Web/Social Media, and Fax), a constituent can choose their preferred communication method.	Phone Email Address Web/Social Media Fax
Do Not Solicit by Phone	Indicates that the constituent does not want to receive commercial (telemarketing) phone calls. When this option is selected, the list of constituents and phone numbers generated for purposes of making phone calls to promote or sell a product, service, or membership, etc. will not include this constituent. If this option is selected, "**Do Not Solicit**" will display in red text to the right of the Phone communication method, as shown below.  Once selected, the "**Allow Solicitation by Phone**" option (described below) will display in the wrench menu to reverse the selection.	Phone
Allow Solicitation by Phone	If the "**Do Not Solicit by Phone**" option described above is selected, this option now displays in the wrench menu. Selecting this option will remove the "**Do Not Solicit**" text to the right of the Phone communication method.	Phone

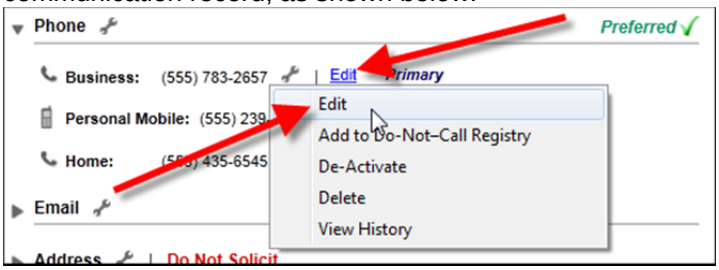
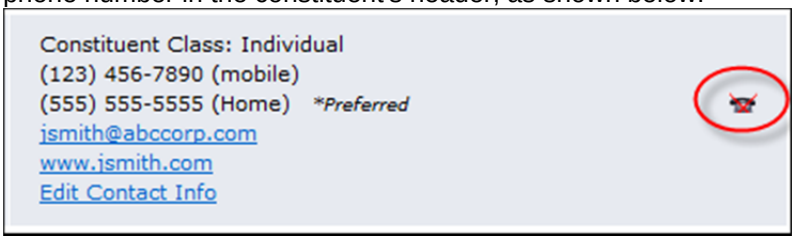
Do Not Solicit by Email	Indicates that the constituent does not want to receive internal emails from the organization. ***The system does not warn or prevent you from sending an email if this option is selected. It is the discretion of the user as to whether or not they will send an email.*** If this option is selected, "**Do Not Solicit**" will display in red text to the right of the Email communication method, as shown below. Once selected, the "Allow Solicitation by Email" option (described below) will display in the wrench menu to reverse the selection.	Email
Allow Solicitation by Email	If the "**Do Not Solicit by Email**" option described above is selected, this option now displays in the wrench menu. Selecting this option will remove the "**Do Not Solicit**" text to the right of the Email communication method.	Email
Do Not Solicit by Fax	Indicates that the constituent does not want to receive commercial faxes. When this option is selected, no faxed communications will be sent to this constituent, regardless of whether it is considered a promotional solicitation. If this option is selected, "Do Not Solicit" will display in red text to the right of the Fax communication method, as shown below. Once selected, the "Allow Solicitation by Fax" option (described below) will display in the wrench menu to reverse the selection.	Fax
Allow Solicitation by Fax	If the "Do Not Solicit by Fax" option described above is selected, this option now displays in the wrench menu. Selecting this option will remove the "Do Not Solicit" text to the right of the Fax communication method.	Fax
Do Not Allow System Notifications	Indicates that the constituent does not want to receive automated emails generated from the Email Notifications system in Personify. ***The system does not display any visual representation that this option is selected.*** Once selected, the "Allow System Notifications" option (described below) will display in the wrench menu for ALL communication methods to reverse the selection.	Phone Email Web/Social Media Fax
Allow System	If the "**Do Not Allow System Notifications**" option described above is selected, this option now displays in the wrench menu.	Phone Email

Notifications		Web/Social Media Fax
View History of Deleted Records	Opens the Deleted Communication Methods window.	Phone Email Web/Social Media Fax
Include Inactive Records	By default, when you first access a constituent's contact information, communication records that have been marked as inactive will NOT display. Selecting this option will display all communication records that have been marked as Inactive. When selected, the "**Exclude Inactive Records**" option will display in the wrench menu.	Phone Email Web/Social Media Fax Domain
Exclude Inactive Records	Select this option if you want to temporarily hide inactive records from the list of communication records. This exclusion option applies only to the communication method section from which it is selected. ***Selecting this option will not persist if you open a new constituent.***	Phone Email Web/Social Media Fax Domain
Include Bad Addresses	By default, when you first access a constituent's contact information, address records that have been marked as Bad will NOT display. Select this option to display all addresses that have been marked as bad. Please note that selecting this option will not persist if you open a new constituent. If this option is selected, "**Bad Address**" will display in red text to the right of the bad addresses, as shown below.  Once selected, the "**Exclude Bad Addresses**" option (described below) will display in the wrench menu to reverse the selection.	Address
Exclude Bad Addresses	If the "**Include Bad Addresses**" option described above is selected, this option now displays in the wrench menu.	Address

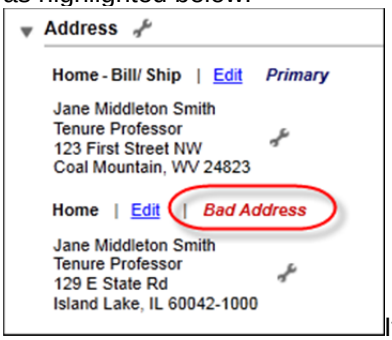
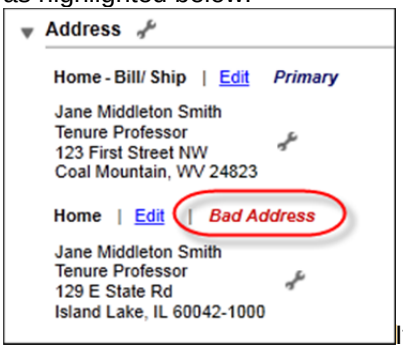
Do Not Send Internal Mail	Indicates that the constituent does not want to be included in solicitation mailings from the organization. The primary purpose of this checkbox is to exclude constituents from receiving multiple mailings when there is more than one member in a household. ***The system does not display any visual representation that this option is selected.*** Once selected, the "**Send Internal Mail**" option (described below) will display in the wrench menu to reverse the selection.	Address
Send Internal Mail	If the "Do Not Send Internal Mail" option described above is selected, this option now displays in the wrench menu.	Address
Do Not Include in Label Sales	Indicates that the constituent does not want to be included in label sets sold to third parties. This is used by the MKT800 process when selecting constituent records for exported marketing lists used outside the organization. If this option is selected, "**Do Not Solicit**" will display in red text to the right of the Address communication method, as shown below.  Once selected, the "Include in Label Sales" option (described below) will display in the wrench menu to reverse the selection.	Address
Include in Label Sales	If the "**Do Not Include in Label Sales**" option described above is selected, this option now displays in the wrench menu. Selecting this option will remove the "Do Not Solicit" text to the right of the Address communication method.	Address

Communication Record Options

Once you have added a constituent's contact information, you can perform the following actions for the records defined by using the wrench icon at the record level (as highlighted below).

Action	Description	Communication Method(s)
Edit	Opens the Contact Method Details screen for phone, email, web/social media, and fax records or the Additional Address screen for address records. This option displays as a link next to a specific communication records, as well as an option in the wrench menu for a specific communication record, as shown below. 	Phone Email Address Web/Social Media Fax Domain
Add to Do-Not-Call Registry	When selected, "**On Do-Not-Call Registry**" will display to the right of the communication record on the Contact Information screen, as highlighted below. Additionally, the **Do Not Call** icon will display to the right of the selected phone number in the constituent's header, as shown below.  ***Currently, Personify does NOT prevent you from adding a primary or preferred communication method to the Do-Not-Call Registry.*** ***To remove a communication record for the do not call list, click the Edit link and uncheck the Do-Not-Call checkbox. Doing so will also remove the Do-Not-Call Date.***	Phone Fax
De-	When selected, "Inactive" will display to the right of the communication	Phone

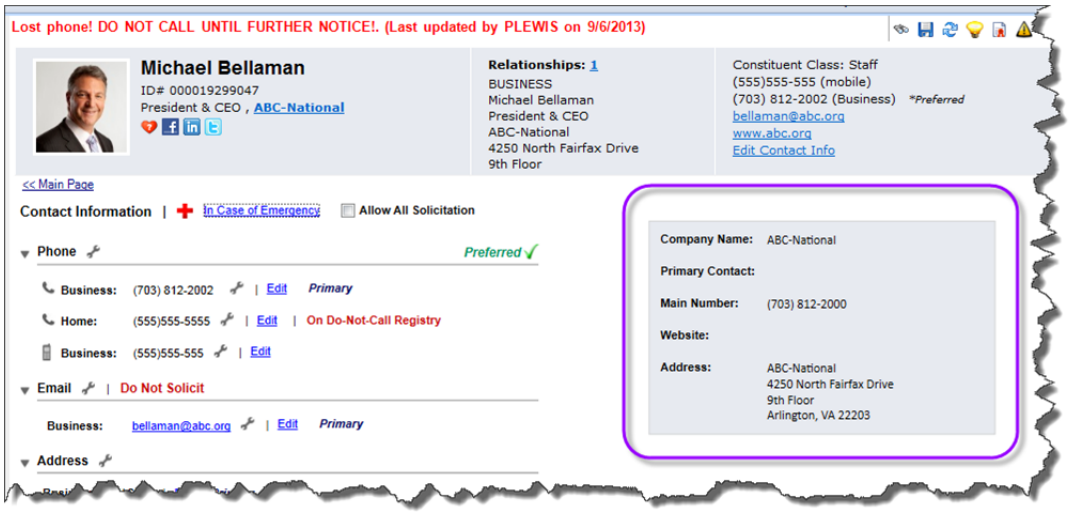
Activate	record on the Contact Information screen, as highlighted below. By default, inactive records will NOT display when you access a constituent. However, you can display inactive records by selecting "Include Inactive Records" from the communication method wrench menu, as discussed above. To reactivate an inactive record, click the Edit link and check the Active checkbox. --- De-activating implies that this communication record should never be used for communication purposes because the number has been disconnected or the constituent moved from that address. Alternatively, you can temporarily restrict solicitation to phone numbers, email addresses, and fax numbers by selecting Add to Do-Not-Call Registry, as discussed above. Additionally, you can restrict solicitation at the communication method via Do Not Solicit by Phone, Do Not Solicit by Email, Do Not Solicit by Fax, Do Not Allow System Notifications, Do Not Send Internal Mail, and Do Not Include in Label Sale, as discussed above.	Email Web/Social Media Fax
Delete	When clicked, the communication record will be removed. Please note that the system will not display a warning message or confirmation message before removing the record. To open the Deleted Communication History screen, select "View History of Deleted Records" from the communication method wrench menu. --- Deleting a customer's primary email address will NOT deleted the SSO information from the Customer or Vendor Customer tables and the customer will still be able to login to Personify e-Business successfully.	Phone Email Web/Social Media Fax
View History	For Phone, Email, Web/Social Media, and Fax records, this option opens the Communication Edit History screen. For Address records, this option opens the Address History screen.	Phone Email Web/Social Media Fax Domain
Mark as Primary	***Marks the communication records as primary.*** --- ***Only one phone number can be marked as primary per Type. For example, you can have a primary Phone/Home number and a primary Mobile/Personal Mobile number, but you cannot have a primary Phone/Home and a primary Phone/Business*** ***Only one email address can be marked as primary.***	Phone Email Address Web/Social Media Fax Domain

	Only one address can be marked as primary. ***Only one web/social media record can be marked as primary.*** ***Only one fax number can be marked as primary.***	
Mark as Bad	Address Status to "BAD". Addresses marked as bad will display "**Bad Address**" to the right of the address on the Contact Information screen, as highlighted below.  If you want to make a bad address good, click **Edit** and select "**Good**" from the Address Status drop-down.	Address
Mark as Bad and Add New	Changes the Address Status to "BAD" and opens the Add Additional Customer Address window. Addresses marked as bad will display "Bad Address" to the right of the address on the Contact Information screen, as highlighted below.  If you want to make a bad address good, click Edit and select "Good" from the Address Status drop-down.	

Primary Employer Contact Information

The constituent's primary employer information displays in the grey box to the right of the communication methods, see below. From this box, you can click the company's website link to open the website in a new browser (*if a website has been defined*).

This section only displays for individual records with an active, primary employment relationship.



Constituent's Activities and Contact Tracking Records

The Activity and Contact Tracking screen gives you an overall view of all communication with a constituent. From the Activity and Contact Tracking screen, you can track certain events that pertain to a constituent in Personify. These fall into the following two general categories: events that are auto-created by Personify (activities) and those that are manually created by staff (contact tracking).

Contact tracking records are created when staff needs to log a phone call, save the contents of a constituent email, note that a fax was sent, and etc. These are entered on a case-by-case basis at the discretion of staff. Typically, organizations have policies in place to dictate when a contact tracking record should be created (rather than jotting notes onto a notepad or saving them elsewhere). The benefit of having these notes in a standard place and format is that clients can report on this data. For instance, how many calls were received per topic, how many touch points have we had this year with this person/company, etc.

Adding a Contact Tracking Record

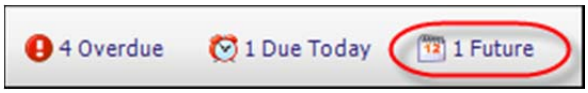
If you start adding a new contact tracking record, but navigate away before saving it, when you try to again select any of CRM360®'s tasks/links for contact tracking, that record will come up and a warning message will display on the bottom, right of the screen. This record will display no matter how you try to access contact tracking – either a detail record or the list. You must do something with this record before you will be allowed to proceed. Either you can save the record, or if you wish to remove it, you can select the refresh button and select "No" when asked if you wish to save their changes.

To add a new contact tracking record:

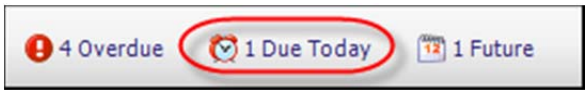
1. From the **Background Information** task category, click **Activity and Contact Tracking**.
   The list of activities and contact tracking records display below the header in CRM360.
2. Click **New**.
3. Please note that the Contact Tracking for field does NOT display in CRM360 detail page because the header already identifies the "owner" of the record. This field will only display when a contact tracking record is created from the Contact Tracking stand-alone screen.
4. If necessary, click **Email Staff** to open a blank email to the selected Staff Assigned. As a courtesy, we recommend that you click the "Email Staff" button to give that person a heads up. Note that emails sent to staff are not captured within the contact tracking record for future reference.

From the Tracking Details section, select the following information when appropriate:

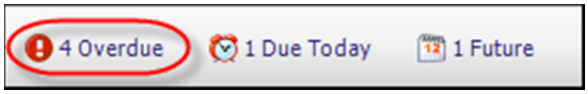
- **Completed?** - if this contact tracking record is complete at the same time as creation, check this checkbox. The date field to the right enables and today's date is selected by default. If necessary, change the completion date. Contact tracking fields can be marked as completed at a later time if necessary. If you select this checkbox during record creation, the Due Date is removed.
- **Contact Date** - by default, this date is set to today. Change this if necessary.
- **Due Date** - by default, this date is set to today. Change this if necessary. This is the date in which the contact tracking record should be complete. If this date is set to a date in the future, the "Future" button will enable in the bottom, left corner of the Personify application for the Staff Assigned, as shown below.



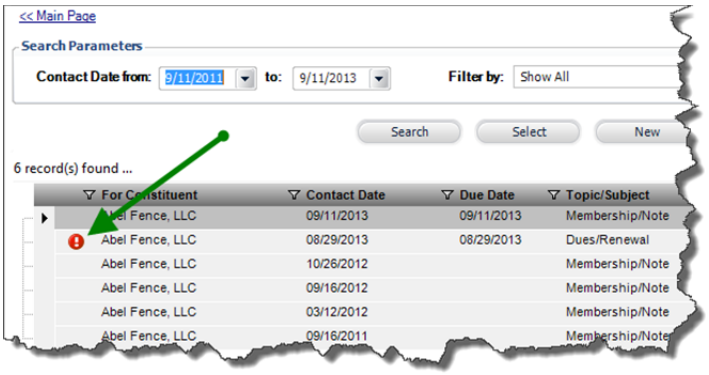
- If this date is set to today, the "Due Today" button will enable in the bottom, left corner of the Personify application for the Staff Assigned, as shown below.



- If this is set to a date in the past, the "Overdue" button will enable in the bottom, left corner of the Personify application for the Staff Assigned, as shown below.



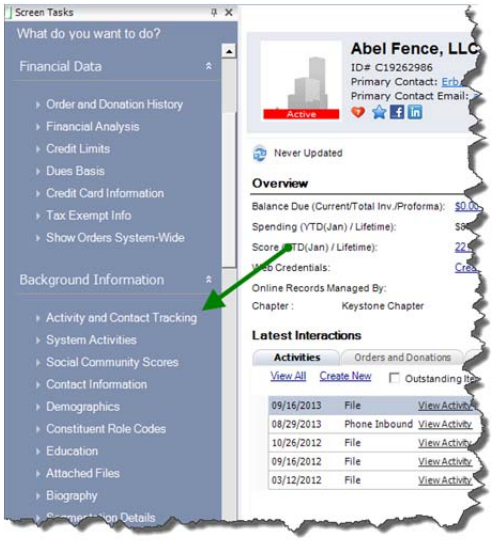
- Additionally, the red overdue icon will display to the left of the record in the list of all activities and contact tracking records for the constituent in CRM360, as shown below.



If you want to add more than one topic/subject to the contact tracking record, click the **More** link to open the **More Topics and Subjects** window.

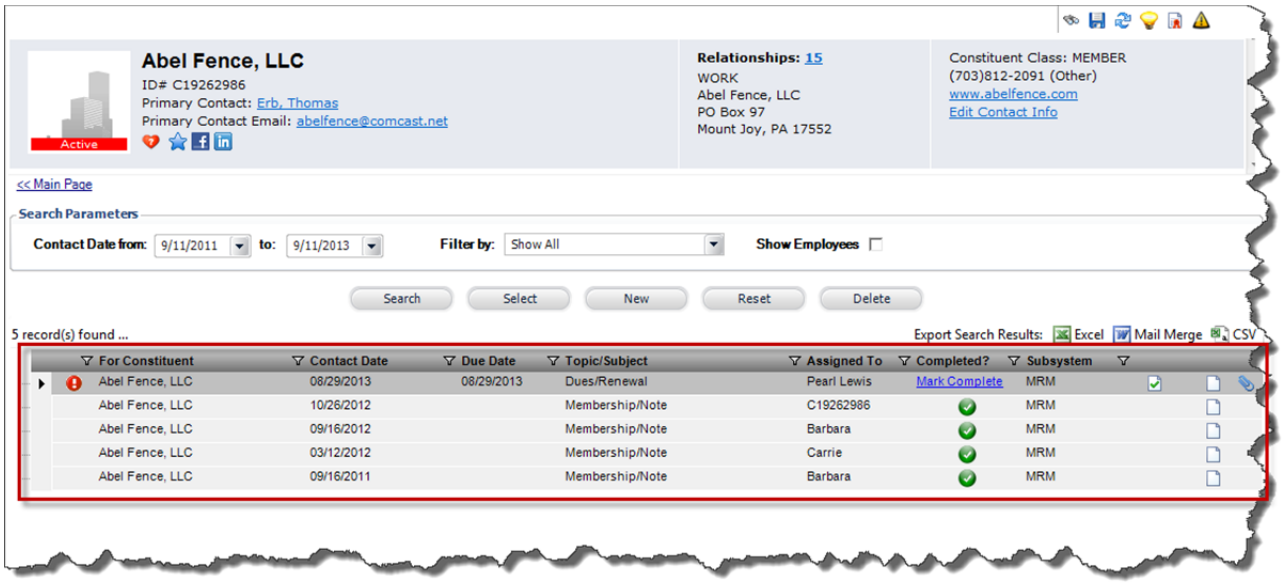
To view activity and contact information:

1. In CRM360, from the **Background Information** task category, click **Activity and Contact Tracking**, as shown below.



In addition to CRM360, you can search across all constituents for contact tracking records from the Contact Tracking screen. This screen is very similar to the list described here, but is used by each user to manage their personal workload, or to search for all records with a particular topic and learn how prevalent a request is, or how other staff members resolved a type of situation.

2. The Activity and Contact Tracking screen displays, as shown below. In the new CRM360 screen, all of these records are listed in the same sequential list (as highlighted below) so you get a complete sense for what has happened with a constituent.


Abel Fence, LLC
ID# C19262986
Primary Contact: Erb, Thomas
Primary Contact Email: abelfence@comcast.net
Active
Relationships: 15
WORK
Abel Fence, LLC
PO Box 97
Mount Joy, PA 17552
Constituent Class: MEMBER
(703)812-2091 (Other)
www.abelfence.com
Edit Contact Info
<< Main Page
Search Parameters
Contact Date from: 9/11/2011 to: 9/11/2013
Filter by: Show All
Show Employees
Search
Select
New
Reset
Delete
5 record(s) found ...
Export Search Results: Excel Mail Merge CSV
For Constituent | Contact Date | Due Date | Topic/Subject | Assigned To | Completed? | Subsystem
Abel Fence, LLC | 08/29/2013 | 08/29/2013 | Dues/Renewal | Pearl Lewis | Mark Complete | MRM
Abel Fence, LLC | 10/26/2012 | | Membership/Note | C19262986 | | MRM
Abel Fence, LLC | 09/16/2012 | | Membership/Note | Barbara | | MRM
Abel Fence, LLC | 03/12/2012 | | Membership/Note | Carrie | | MRM
Abel Fence, LLC | 09/16/2011 | | Membership/Note | Barbara | | MRM

3. You can filter out items that are not of interest, if desired, using column header filters, as highlighted in figure below.

5 record(s) found ...
Export Search Results: Excel Mail Merge CSV
For Constituent | Contact Date | Due Date | Topic/Subject | Assigned To | Completed? | Subsystem

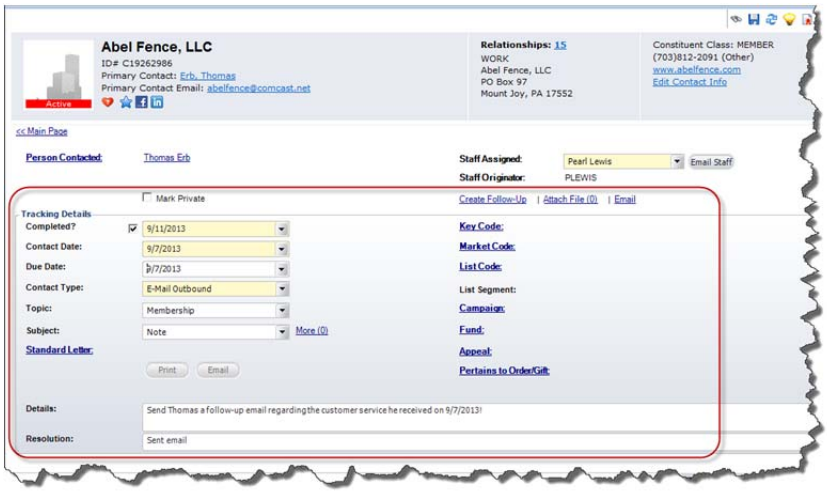
4. When you double-click on a contact tracking record, the new detail screen opens (see "Contact Tracking Details" below for more information). Double-clicking on an activity record opens the Activities screen (which provides less detail than contact tracking).

If you select a record in the grid and click Delete, the system will display a confirmation message asking if you want to permanently delete the record. Please keep in mind that once a record is deleted, it cannot be retrieved without getting it from a backup database. Delete is offered as a way to correct mistakes, but should be used rarely so as much history as possible is preserved. Deleting a contact tracking record or activity will also remove it from the Activities tab in the Latest Interactions section on the Main Page.

5. Click **New** to create a new contact tracking record.

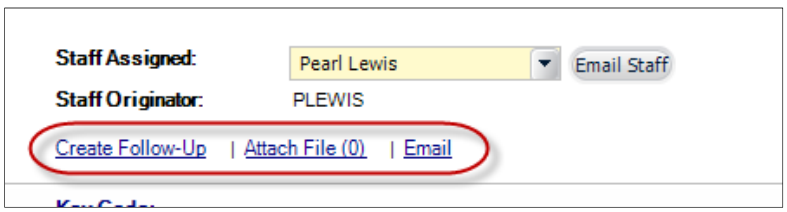
Contact Tracking Details

When you create a new contact tracking record or double-click an existing contact tracking record in the records grid on the Activity and Contact Tracking screen, the detail screen opens with more information about the contact tracking record, as highlighted below.



Depending on the type of record, this screen may appear different. In the image above, a contact tracking record is displayed.

You can capture details and interact with this screen in numerous ways. The following tasks can be accomplished at the contact tracking record detail level from the links highlighted in the image below:



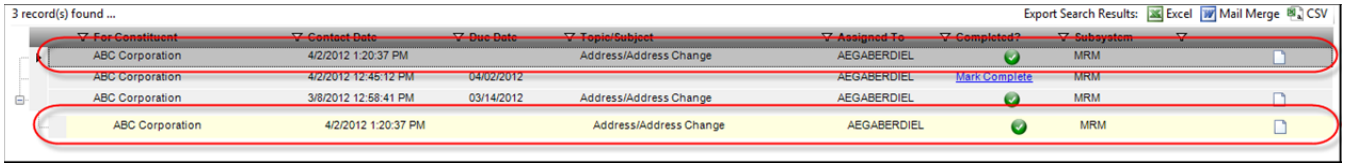
Create Follow-Up

For example, you may want to call a customer in two weeks to verify he or she has no additional questions. The setup for a follow-up record is exactly the same as a contact tracking record.

> **Note** *You cannot create a follow-up record of a follow-up record. Follow-up records created from a follow-up record will just display as another follow-up to the parent record.*

> **Note** *If, by creating a follow-up record, it is implied that the parent record is resolved, make sure to mark the parent record as complete.*

1. Open the appropriate constituent in CRM360 screen.
2. From the **Background Information** task, click **Activity and Contact Tracking**.
3. Double-click the contact tracking record in which you want to create a follow-up record.
4. Click the **Create Follow-Up** link.
   A new contact tracking record is opened in which the Contact Date and Due Date are set to today. Additionally, the Topic and Subject selected in the parent contact tracking record are carried over to the follow-up record.
5. Proceed to select the appropriate contact tracking information.
6. Click **Save**.
   The record is added to the list of the constituent's activities and contact tracking records. Additionally, follow-up records will display below the parent record.


3 record(s) found ...
Export Search Results: Excel Mail Merge CSV
For Constituent
Contact Date
Due Date
Topic/Subject
Assigned To
Completed?
Subsystem
ABC Corporation 4/2/2012 1:20:37 PM Address/Address Change AEGABERDIEL MRM
ABC Corporation 4/2/2012 12:45:12 PM 04/02/2012 AEGABERDIEL Mark Complete MRM
ABC Corporation 3/8/2012 12:58:41 PM 03/14/2012 Address/Address Change AEGABERDIEL MRM
ABC Corporation 4/2/2012 1:20:37 PM Address/Address Change AEGABERDIEL MRM

Attach File:

If attachments have been uploaded to this contact tracking record, they will be listed in this window and you can double-click the record to open it. Additionally, you can select the appropriate attachment and click Delete to remove it from this contact tracking record. Please use discretion when deleting, so history is preserved.

1. Click **Browse** to add a new attachment to this contact tracking record.

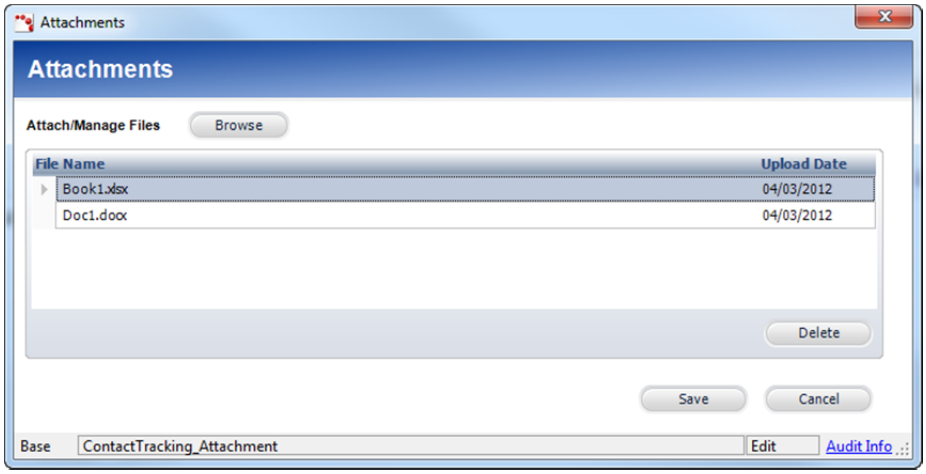
Note that the browse window looks for documents by default. If you wish to attach a different type of file (e.g. a spreadsheet or PDF) then you can override this default.

Email:

Click this link to open a blank email to this constituent. Note, if a standard letter has been attached to the contact tracking record, the body of the standard letter will display in the email. The standard letter's contents can be removed from the email if you did not intend to email it.

View Email:

If an email has already been sent from this contact tracking record, this link will display instead of the "Email" link discussed above. Click this link to open the saved email in your default email window. Personify only captures one email per Contact Tracking item. If you want to reply or forward an existing email or send a new email, it is recommended that you do so from a follow-up record.



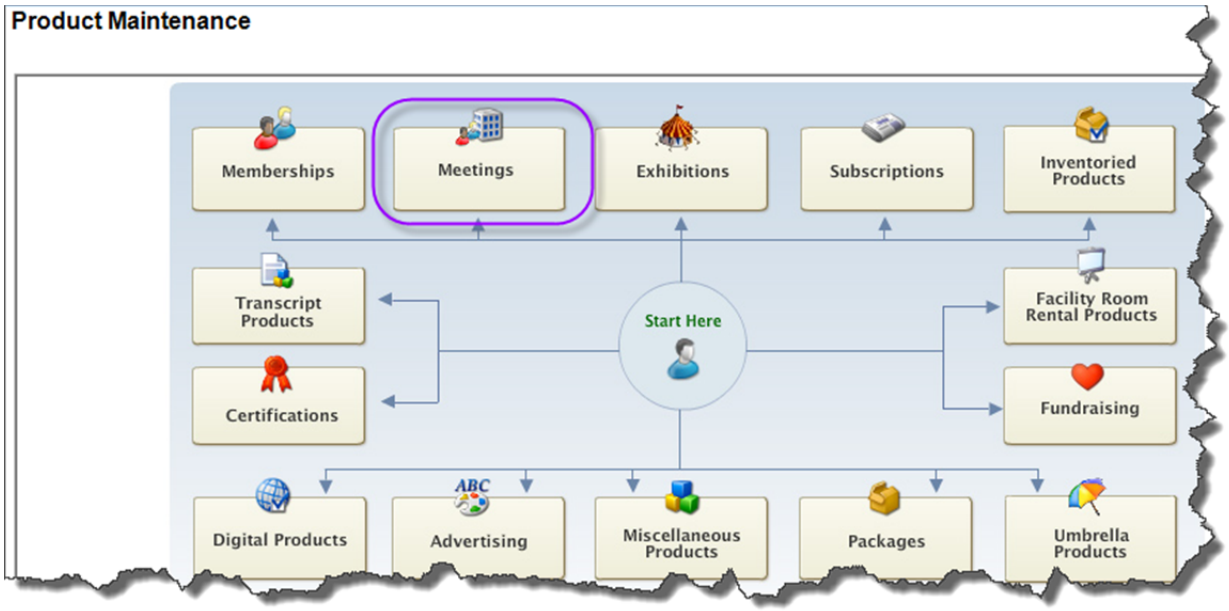
Introduction

Setting up meetings involves setting up a facility, a meeting, and one or more events or break-out sessions associated to the meeting. A meeting can range from a single-day course to a large multi-day annual meeting with hundreds of break-out sessions.

Creating a Meeting

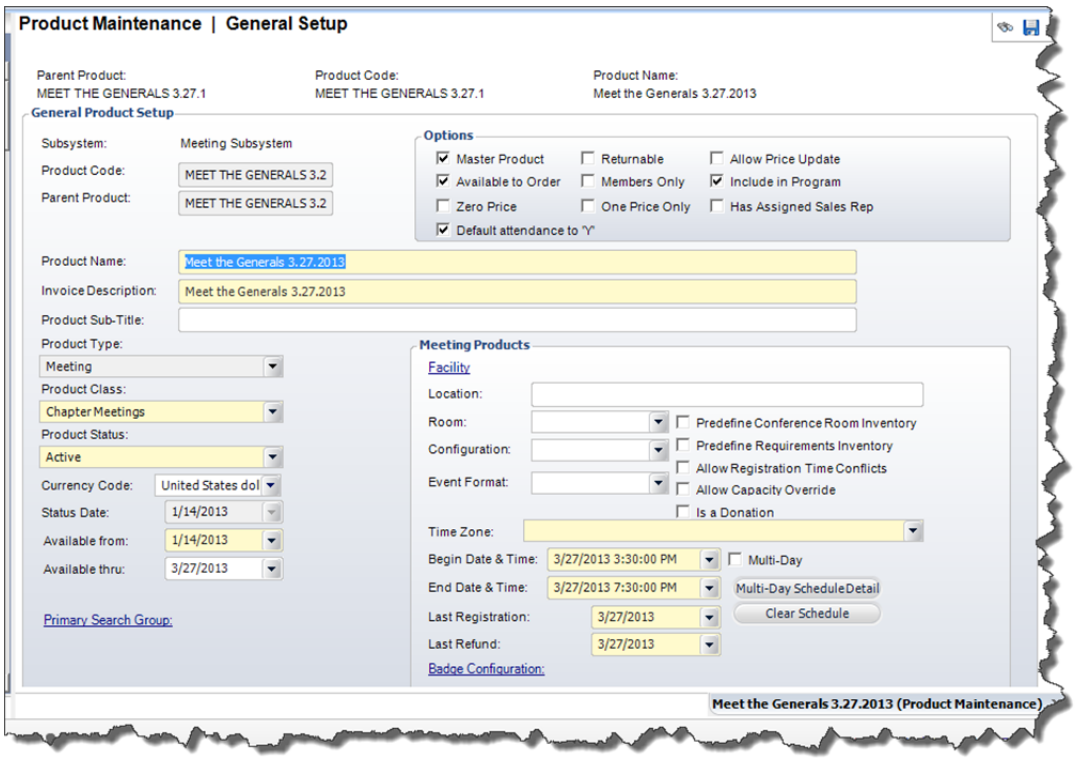
For a master meeting product, the Product Code and Parent Product values are the same. To relate a session to the master meeting product, select the Parent Product of the master meeting. The related sessions are then defined by the Product Code.

1. From **Home Page**, select **Add a New Product**.
2. Click **Meetings**, as shown below.



YOU CAN ALSO START IN MEETING CENTRAL AND CLICK DEFINE MEETINGS|CREATE A NEW PRODUCT

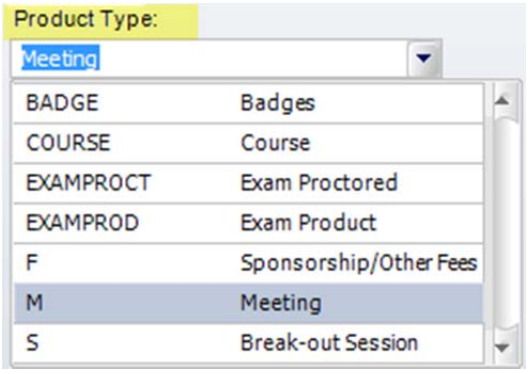
3. The General Setup screen displays, as shown below.



4. Enter the **Product Code**.
5. **Parent Product** defaults to the same value.
6. Enter the **Product Name**.
7. **Invoice Description** defaults to the same value.

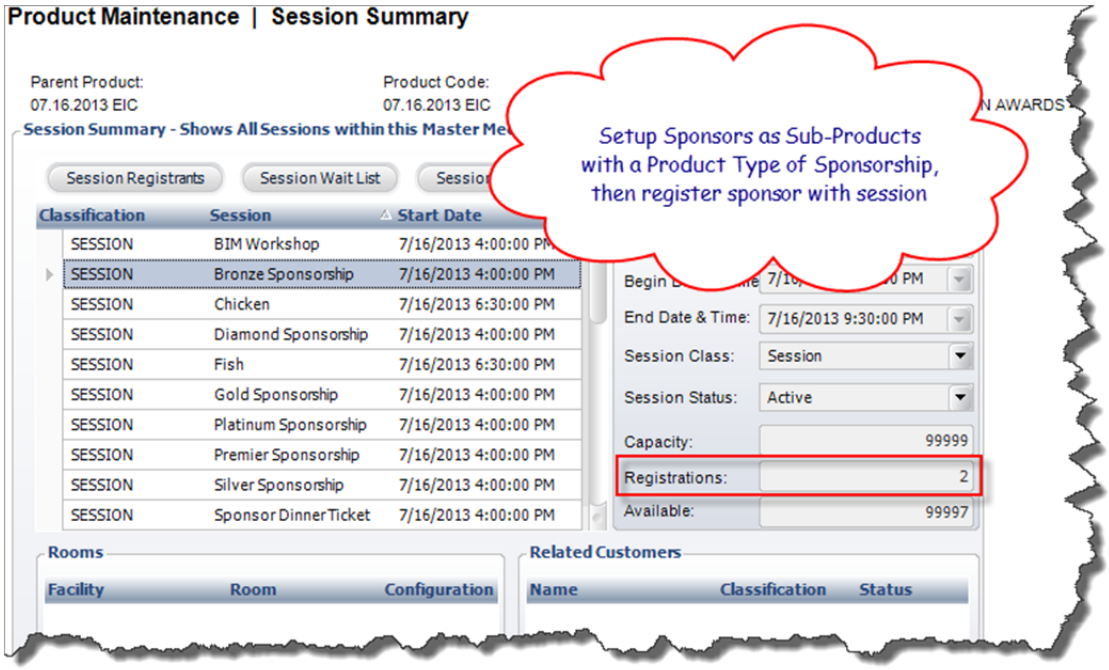
YOU CAN ADD MORE DETAIL TO THIS INVOICE, THIS WILL PRINT ON YOUR INVOICES!

8. Select the **Product Type** from the drop-down.



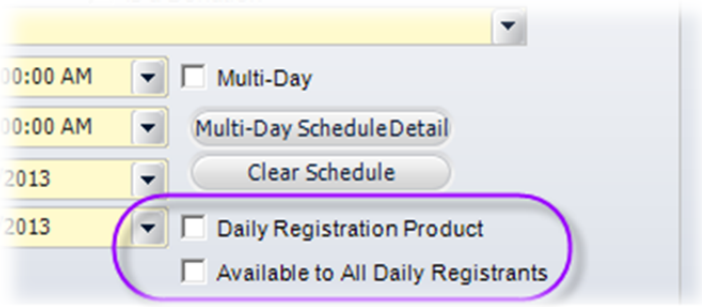
9. To create a session product, select "**Break-Out Session**" from this drop-down. Meeting sub-products include "Badge", "Exam Product" and "Sponsorship/Other

Fees".

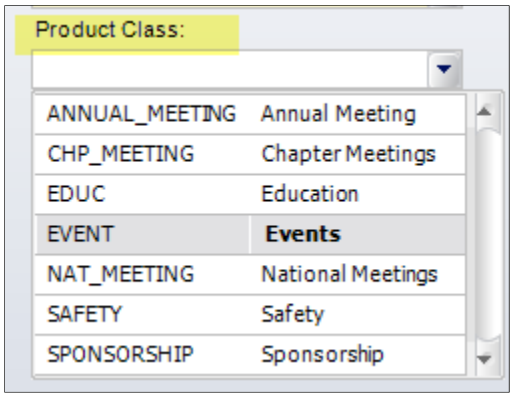


TIP: SET UP SPONSORS AS SUB-PRODUCTS (AKA SESSIONS)

10. If you change the Product Type to "Break-Out Session, two checkboxes appear in the Meeting Products section to allow you to specify a daily registration product, **Daily Registration Product** and **Available to All Daily Registrants**.



11. Select the **Product Class** from the drop-down.



12. Select the **Product Status** from the drop-down.
13. Select the **Available from date** from the drop-down.

The Available From date cannot be changed if orders have already been created for it.

14. In the Meeting Products section, perform the following:
    a. Click the **Facility** link and search for a facility.
    Available facilities are defined on the Meetings Facility Maintenance screen. For more information, please see below.
    b. Enter the **Location**, if necessary.
    c. Select the **Room** and **Configuration** from the drop-downs.

If the meeting has multiple facilities, you can select the additional facilities on the Assign a Room screen.

15. Enter the Begin Date & Time and End Date & Time.

If you update the Begin Date & Time and/or End Date & Time of the meeting product, the system will NOT ask if you want to also update the Start Date and End Date of the room assignments. To manually update the Start Date and End Date of the room assignments, access the Assign a Room screen.

16. Select the **Last Registration** date from the drop-down.
17. Select the **Last Refund** date from the drop-down.
18. Click **Save**

Define Meeting Facilities

If your organization needs to assign meeting rooms to break-out sessions or general sessions, you need to set up the facility before you set up the meeting. The facility must be defined as a company in the system before you can perform the facility setup. This task only needs to be performed once.

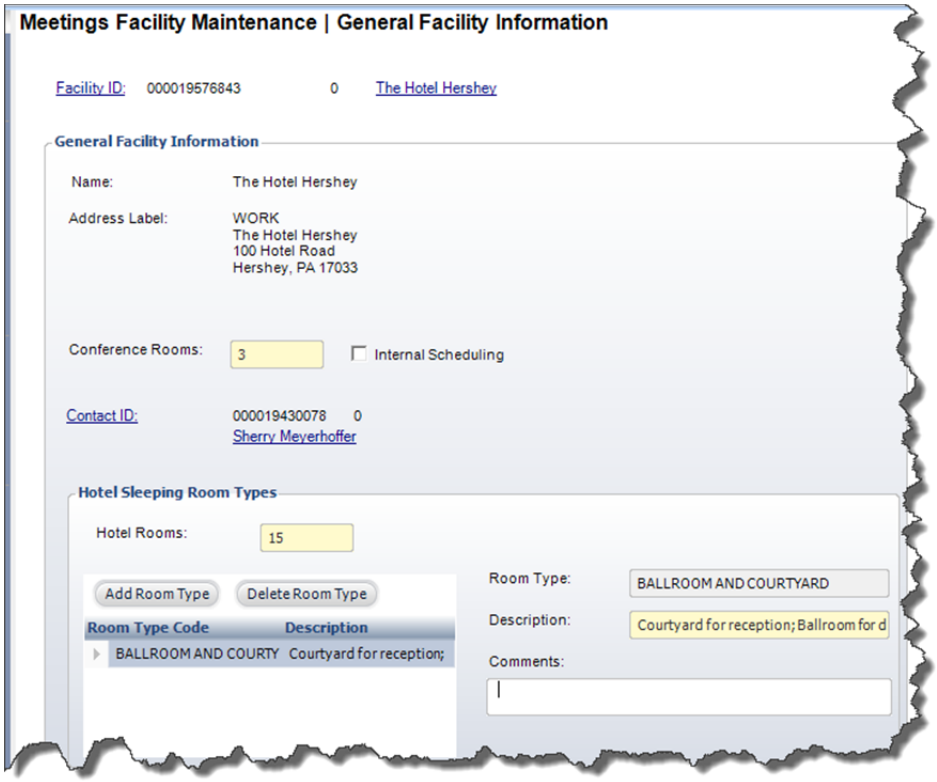
If you do not need to assign a facility to a meeting, you can skip this step.

The Meetings Facility Maintenance screen is used to create an inventory of convention centers, hotels, and rooms. This screen represents a central facilities application in which internal and external meeting and conference rooms are defined by name, size, and configuration. This screen also assists in tracking meeting expenses, such as the cost of a hotel or room rentals.

1. From Meeting Central, click **Define Meeting Facility and Rooms**. Or, from the meeting Product, click **Define Facility** from the **Related Tasks** group.

2. Click **Create New Facility**. The Customer Chooser displays.

3. Search for and select the appropriate company record. The company opens in Meetings Facility Maintenance, as shown below.



4. Enter the number of Conference Rooms at the facility.

5. The system does not allow more conference rooms in the facility other than the number entered in this field. If this number is 10, for example, Personify only allows 10 rooms to be defined.

6. Click the **Contact ID** link to search for and select a contact associated with this facility.

7. To define hotel sleep rooms, perform the following:
   a. From the Hotel Sleeping Room Types section, enter the number of **Hotel Rooms**.
   b. Click **Add Room Type**.
   c. Enter the **Room Type**.

d. Enter a **Description** of the room.
e. If necessary, enter any **Comments**.

Comments can be used for driving directions which will print on invoice.

8. Click **Save**.

Copy a Meeting Product

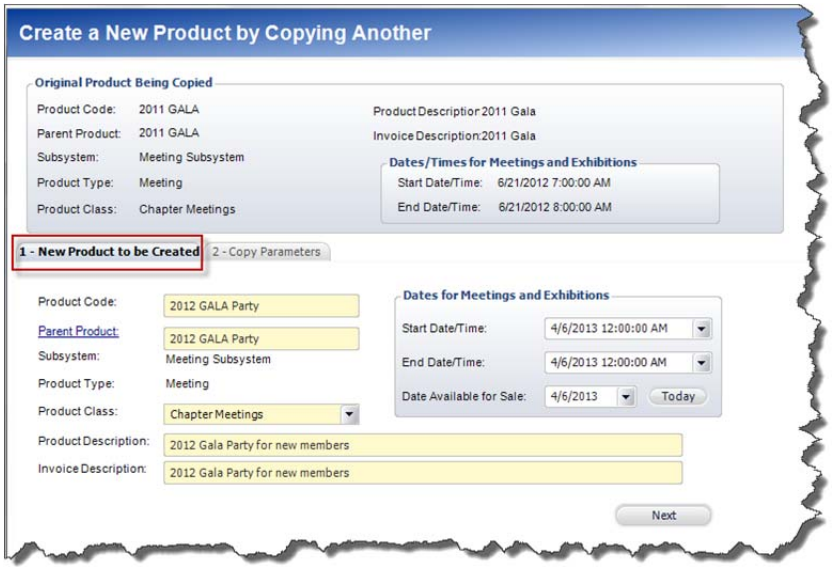
Copy This Product allows you to copy account details from an existing event; simply search for the event, highlight and select Copy This Product.

When copying a meeting, copy meetings that will have the same Product Type.

Subsyst	Parent Product	Product Code	Invoice Description	Product Type	Product Class
MTG	TX HOLD 'EM TOURN	TX HOLD 'EM TOURN	Texas Hold 'Em Tournamenet	M	CHP_MEETING
MTG	SPRINGGOLF_2013_03	SPRINGGOLF_2013_03	Spring Golf Tournament 2013	M	EVENT
MTG	NOVBFASTRVSD	**NOVBFASTRVSD**	November Breakfast Revised for Close Out	M	CHP_MEETING
MTG	NOV MKT SEMINAR	NOV MKT SEMINAR	November Marketing Seminar	M	ANNUAL_MEETING
MTG	MKT SEMINAR NOV 2012	MKT SEMINAR NOV 2012	How To Develop a Strategic Maketing Plan	M	CHP_MEETING
MTG	MARKETING SEMINAR APRIL	MARKETING SEMINAR APRIL	LinkedIn Seminar April 2013	M	CHP_MEETING
MTG	LIEN AND BOND CLAIMS	LIEN AND BOND CLAIMS	Lien and Bond Claims Seminar	M	CHP_MEETING
MTG	INDEMNITY AND INSURANCE-	INDEMNITY AND INSURANCE-	Legal Seminar- Indemnity and Insurance	M	CHP_MEETING
MTG	HOLIDAY PARTY 2012	BAND SPONSOR	Band Sponsor	F	DONATION
MTG	HOLIDAY PARTY 2012	DOOR PRIZE SPONSOR	Door Prize Sponsorship	F	DONATION
MTG	HOLIDAY PARTY 2012	DRINK SPONSOR	Drink Sponsor	F	DONATION
MTG	HOLIDAY PARTY 2012	FOOD SPONSOR	Food Sponsor	F	DONATION
MTG	HOLIDAY PARTY 2012	HOLIDAY PARTY 2012	December Holiday Party	M	CHP_MEETING

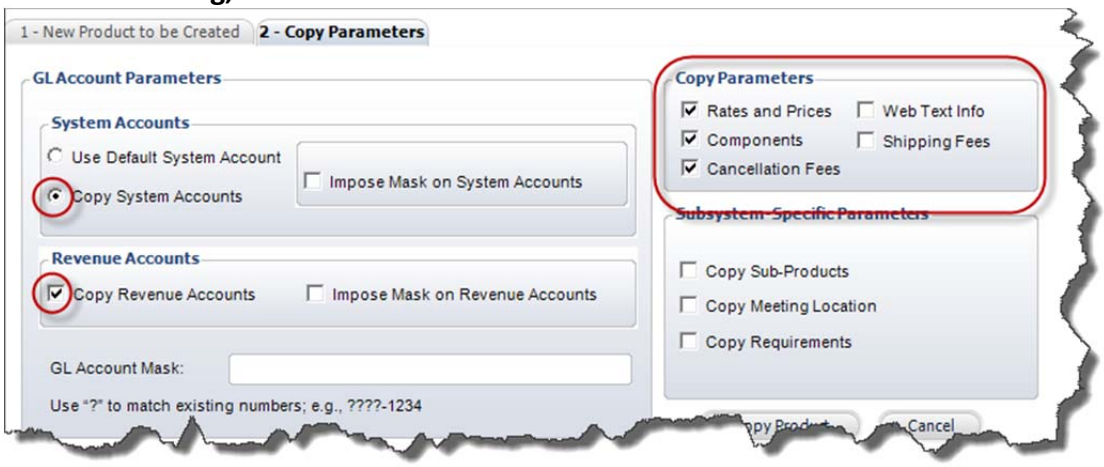
1. Click **Find a Product** from the Home Page
2. Enter **Meeting Subsystem** in the Product Area field
3. Locate a meeting that will have the same GL and Revenue account numbers
4. Click **Copy this Product**

Tab 1: General Products


Create a New Product by Copying Another
Original Product Being Copied
Product Code: 2011 GALA
Parent Product: 2011 GALA
Subsystem: Meeting Subsystem
Product Type: Meeting
Product Class: Chapter Meetings
Product Description: 2011 Gala
Invoice Description: 2011 Gala
Dates/Times for Meetings and Exhibitions
Start Date/Time: 6/21/2012 7:00:00 AM
End Date/Time: 6/21/2012 8:00:00 AM
1 - New Product to be Created
2 - Copy Parameters
Product Code: 2012 GALA Party
Parent Product: 2012 GALA Party
Subsystem: Meeting Subsystem
Product Type: Meeting
Product Class: Chapter Meetings
Product Description: 2012 Gala Party for new members
Invoice Description: 2012 Gala Party for new members
Dates for Meetings and Exhibitions
Start Date/Time: 4/6/2013 12:00:00 AM
End Date/Time: 4/6/2013 12:00:00 AM
Date Available for Sale: 4/6/2013
Today
Next

Enter the new name of the meeting in the **Product Code** and **Parent Product** fields.

Tab 2: Rates and Pricing, GL & Revenue Accounts



1. Select **Copy System Accounts**, **Copy Revenue Accounts** and **Rates and Prices**.
2. Click **Copy Product**.

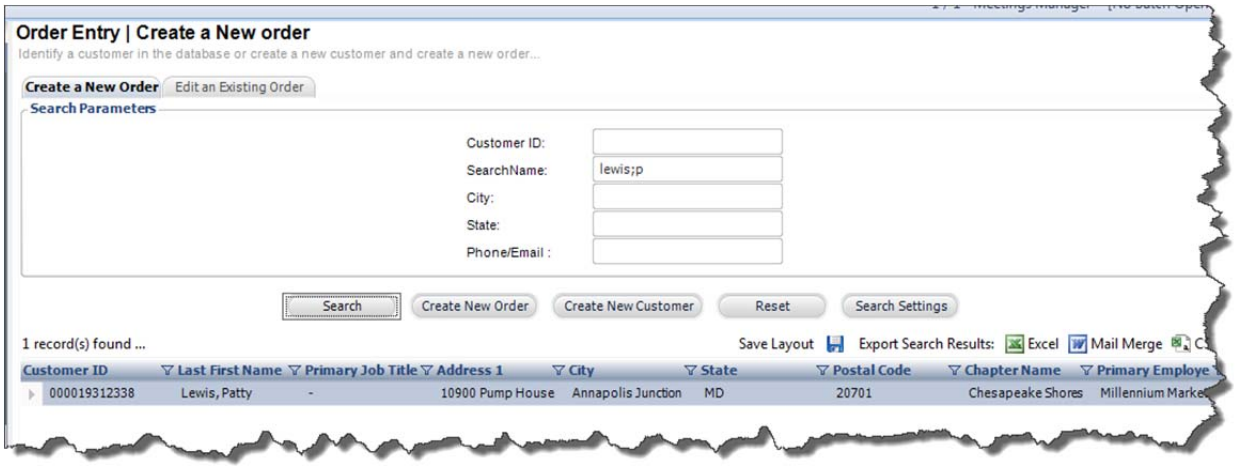
Accessing the Meetings Central Launch Screen

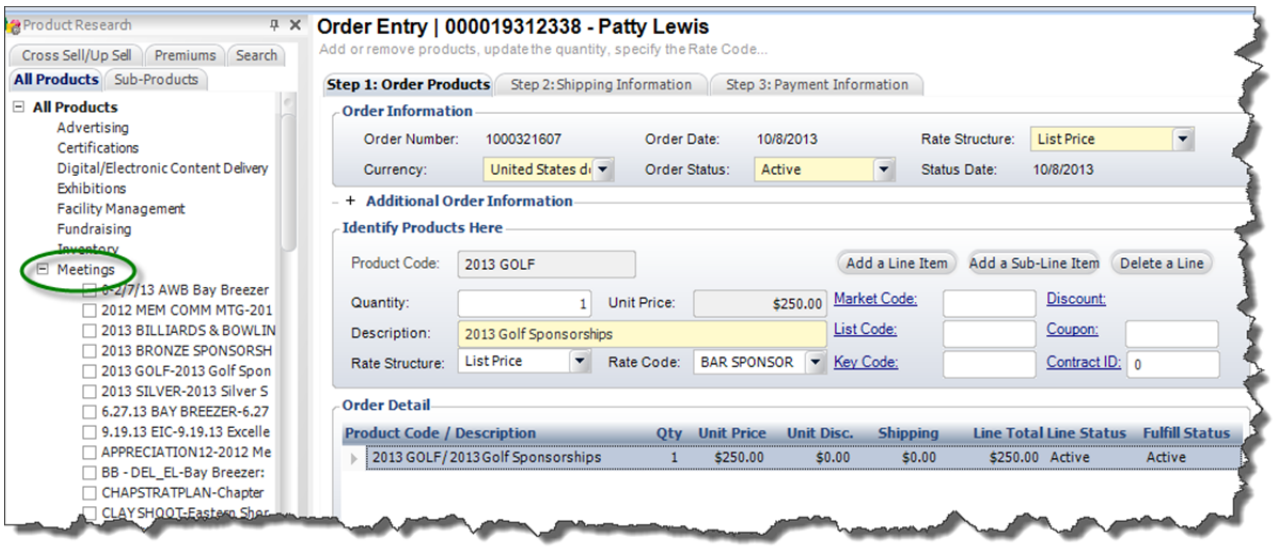
The Meeting Central screen can be accessed by selecting one of the following:

- Click the Meeting Central tab
- Type in "mtgcentral" within the command line

Processing Standard Registration

A standard registration takes you directly to an order entry screen. This screen allows you to create an order for a meeting in which a constituent will attend. This way you can register all (or just some) members from a company or different company on one order. This also the same as clicking on **Search for a product to purchase** from the **Home Page**.

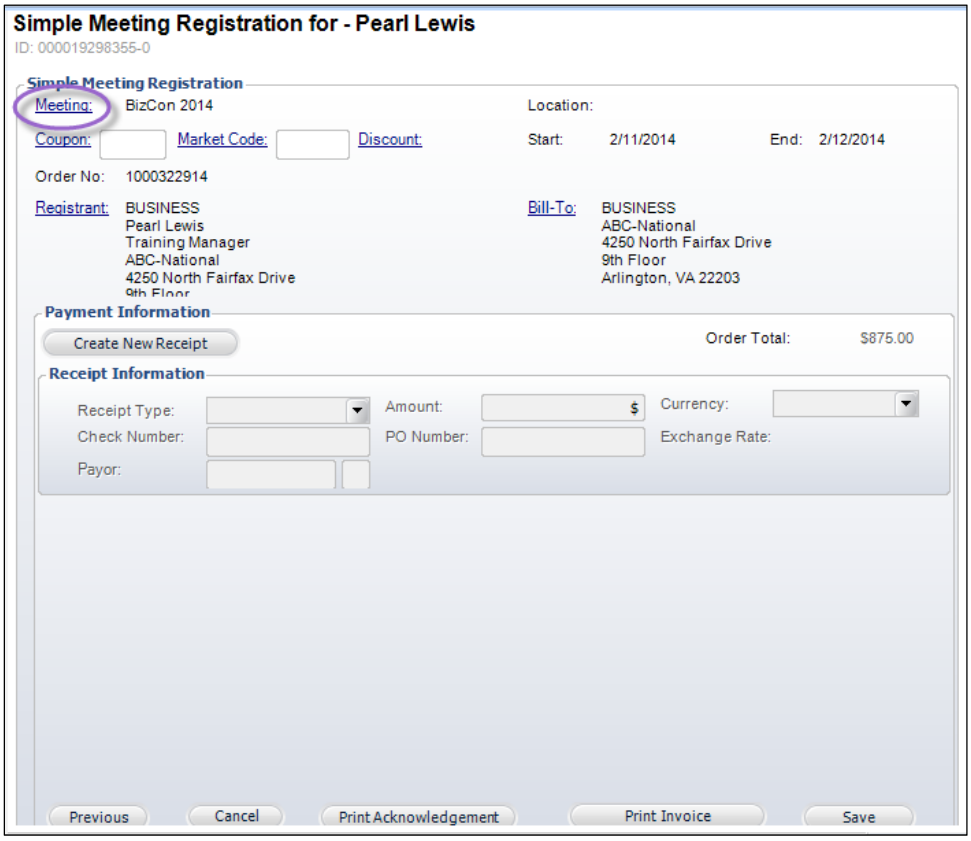




Processing a Simple Meeting Registration

A simple meeting refers to a meeting product that contains no breakout sessions or social events. The simple meeting registration functionality allows you to register a customer for a simple meeting, including payment information, all on one simple screen.

1. From **Meeting Central**, click **Process Simple Registrations**.



2. Search for and select the appropriate customer.
3. The Simple Meeting Registration screen displays with the customer's Registrant information and Bill-To information entered as shown in the second screen on the left.
4. Click the **Meeting** link. A Product Chooser search screen displays.
5. Search for and select the appropriate meeting.
6. If necessary, click the Coupon, Market Code, and/or Discount to search and select a coupon, market code, and/or discount, respectively.
7. If necessary, modify the Registrant or Bill-To information by clicking the respective link.

8. Click **Create New Receipt**.

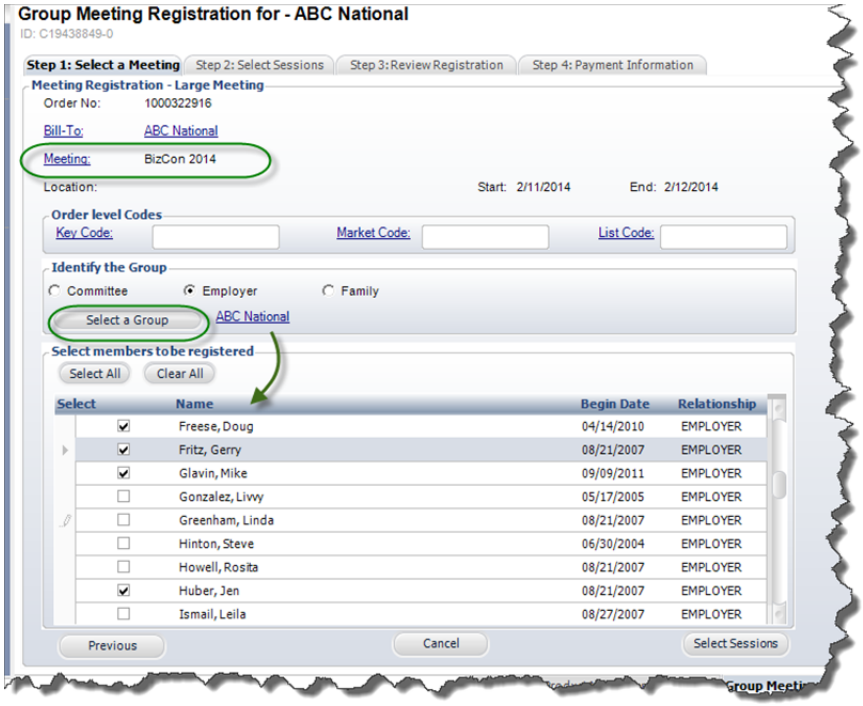
   If a batch is not already opened, you are prompted to open a batch for edit.

9. Click **Save**.

Processing a Group Meeting Registration

Similar to the simplicity of the Simple Meeting Registration screen is the Group Meeting Registration screen. This screen allows you to create a single order for a meeting in which a group will attend. This way you can register all (or just some) members of a group for a specific meeting at once and pay for the order in one receipt with a single Bill-To person.

1. From Meeting Central, click **Process Group Registrations**.



2. Search for and select the appropriate customer.

   The Group Meeting Registration screen displays with the Order Number, Bill-To information, and all members within the group listed as shown in the screen to the right.

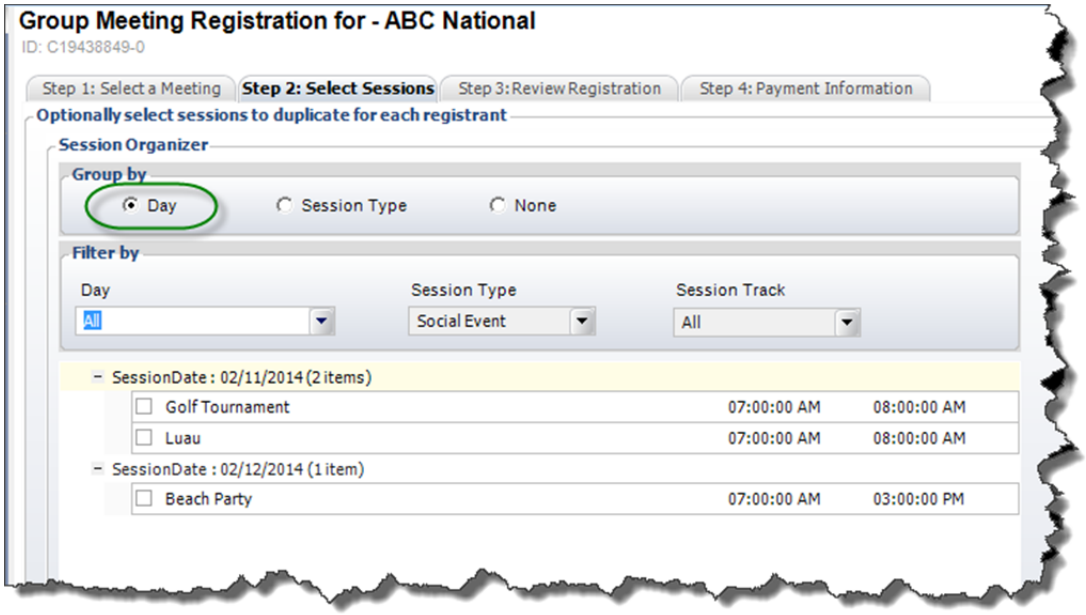
3. If necessary, modify the **Bill-To** information by clicking the respective link.
4. Click the **Meeting** link.

A Product Chooser search screen displays.

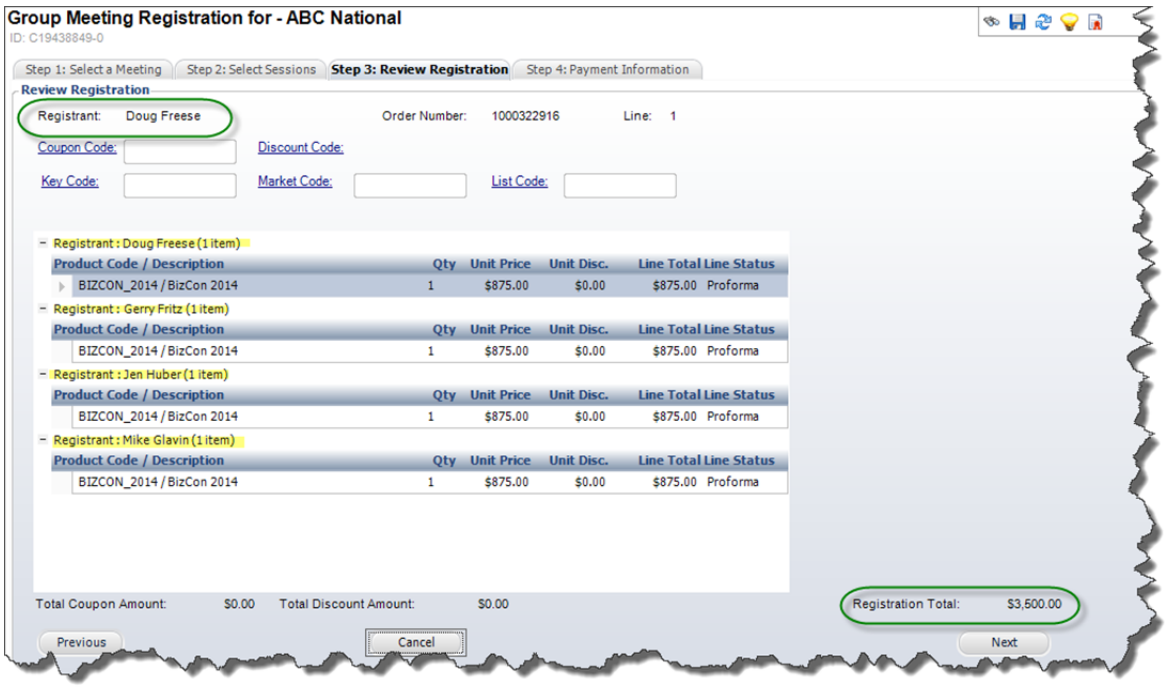
5. Search for and select the appropriate meeting.
6. If necessary, click the Key Code, Market Code, and/or List Code to search and select the appropriate code.
7. From the Identify the Group section, select the appropriate radio button and click **Select a Group**.
8. Search for and select the appropriate Committee, **Employer**, or Family.

The members are displayed in the grid below.

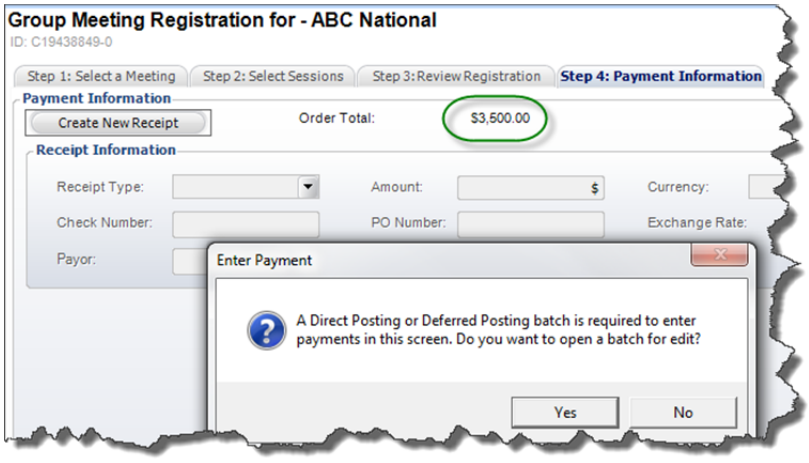
9. Select the appropriate members to be registered or click **Select All** to register all members of the group for this meeting.
10. Select the **Step 2: Select Sessions** tab.
10. The Session Organizer displays, as shown below.



11. If necessary, use the **Group by** and Filter by sections to organize the available sessions.
12. Select the sessions to register the group for.
13. Click **Next**.
14. Select the **Step 3: Review Registration** tab.
11. A screen including a listing of all group members with each session he/she is registered for appears on the screen including order line information for each session/member.



12. If a session conflict occurs and the Allow Session Conflict is not checked for the meeting product, the session that occurs appears first on the session list is added to the order and the other conflicted session(s) are not.
15. Optionally, click Coupon Code, Discount Code, Key Code, Market Code, and/or List Code to search and select a coupon, discount, key code, market code, and/or list code, respectively.
16. Click **Next**.
13. From this screen you can also choose to delete a specific session from a specific member by right-clicking the member's session and selecting Delete.
14. Select the **Step 4: Payment Information** tab.

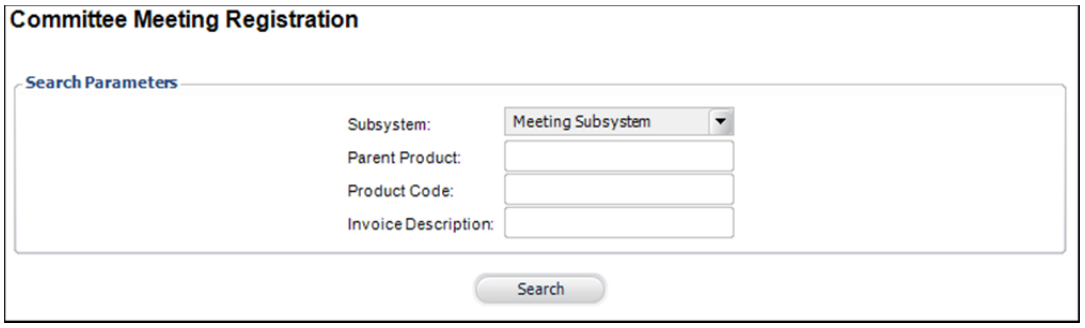


15. If a batch is not already opened, you are prompted to open a batch for edit.

17. Click **Create New Receipt**.
18. Enter the appropriate payment information.
19. Click **Save**.

Manage Meeting Committees

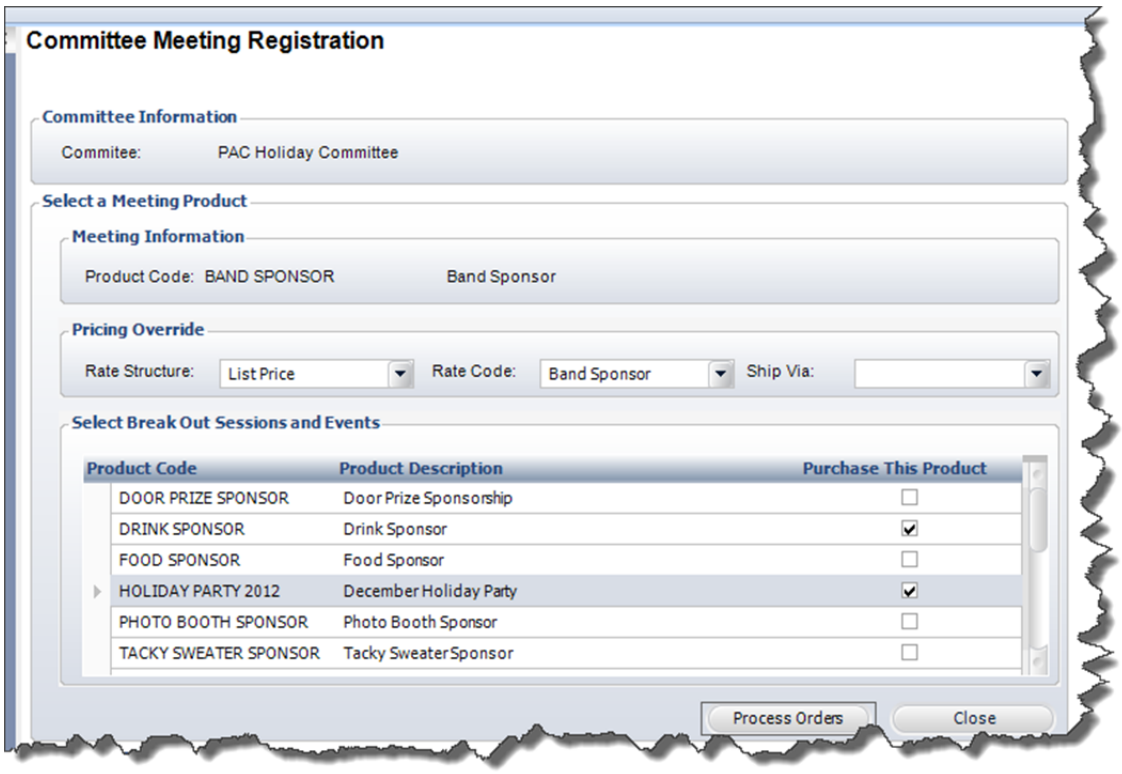
The Manage Meeting Committees displays committee central search screen. From here you can pull up a committee and click **Register Members for a Meeting** from the **Common Tasks** pane.



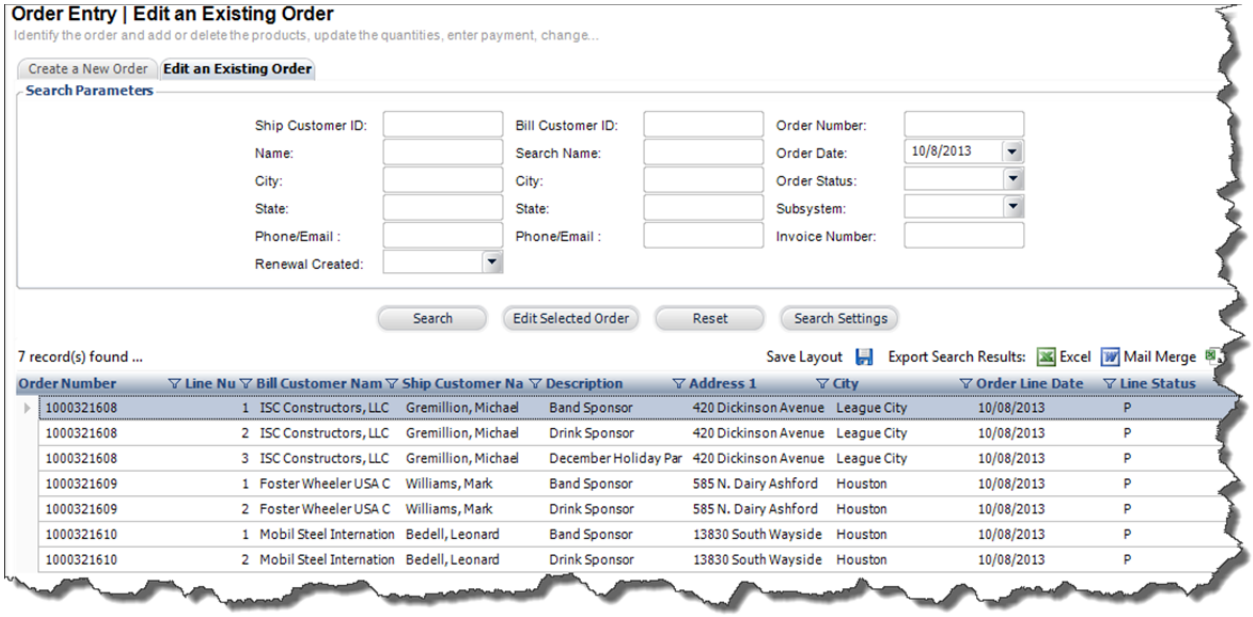
Search for and select the meeting you want to register the committee member for. The Committee Meeting Registration screen displays, as shown below.

If necessary, to override existing pricing, select the Rate Structure, Rate Code, and Ship Via from the drop-downs.

If you do not select a Rate Structure or Rate Code, the system will create the meeting order(s) by assigning the best rate structure for which the committee member qualifies and will use the default rate code for that rate structure.

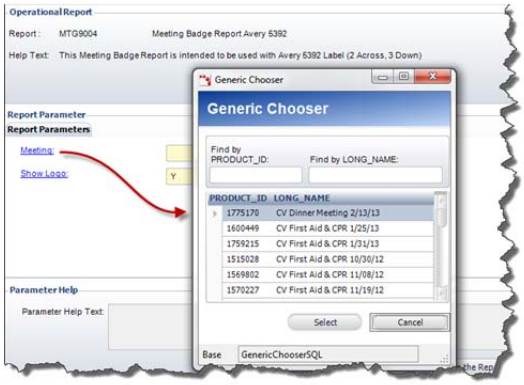


5. Click Process Orders. Meeting orders are created for all the customer records listed as committee members on the Committee Members tab. The status displays in the Order Creation Status section of the screen


Order Entry | Edit an Existing Order
Identify the order and add or delete the products, update the quantities, enter payment, change...
Create a New Order
Edit an Existing Order
Search Parameters
Ship Customer ID:
Name:
City:
State:
Phone/Email :
Renewal Created:
Bill Customer ID:
Search Name:
City:
State:
Phone/Email :
Order Number:
Order Date: 10/8/2013
Order Status:
Subsystem:
Invoice Number:
Search
Edit Selected Order
Reset
Search Settings
7 record(s) found ...
Save Layout
Export Search Results: Excel Mail Merge
Order Number | Line Nu | Bill Customer Nam | Ship Customer Na | Description | Address 1 | City | Order Line Date | Line Status
1000321608 1 ISC Constructors, LLC Gremillion, Michael Band Sponsor 420 Dickinson Avenue League City 10/08/2013 P
1000321608 2 ISC Constructors, LLC Gremillion, Michael Drink Sponsor 420 Dickinson Avenue League City 10/08/2013 P
1000321608 3 ISC Constructors, LLC Gremillion, Michael December Holiday Par 420 Dickinson Avenue League City 10/08/2013 P
1000321609 1 Foster Wheeler USA C Williams, Mark Band Sponsor 585 N. Dairy Ashford Houston 10/08/2013 P
1000321609 2 Foster Wheeler USA C Williams, Mark Drink Sponsor 585 N. Dairy Ashford Houston 10/08/2013 P
1000321610 1 Mobil Steel Internation Bedell, Leonard Band Sponsor 13830 South Wayside Houston 10/08/2013 P
1000321610 2 Mobil Steel Internation Bedell, Leonard Drink Sponsor 13830 South Wayside Houston 10/08/2013 P

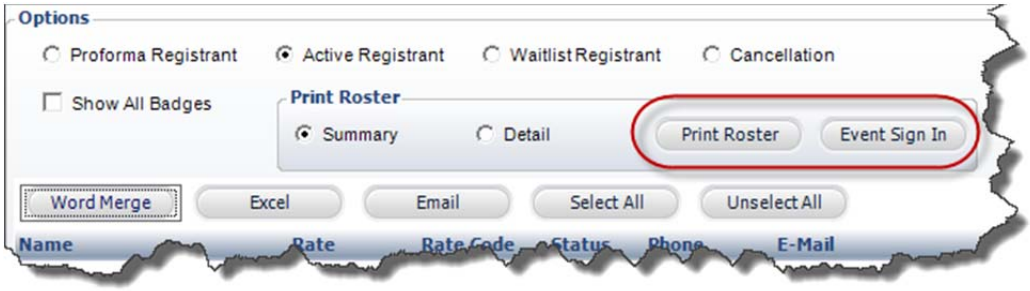
Printing Badges

1. From the Home Page, click Run an Online report from the
2. Search for **MTG9004** or **MTG9005**
3. The **report parameters** gives you the option to select the meeting and whether you want a logo on the badge.


Operational Report
Report : MTG9004 Meeting Badge Report Avery 5392
Help Text: This Meeting Badge Report is intended to be used with Avery 5392 Label (2 Across, 3 Down)
Report Parameter
Report Parameters
Meeting:
Show Logo:
Parameter Help
Parameter Help Text:
Generic Chooser
Generic Chooser
Find by PRODUCT_ID:
Find by LONG_NAME:
PRODUCT_ID LONG_NAME
1775170 CV Dinner Meeting 2/13/13
1600449 CV First Aid & CPR 1/25/13
1759215 CV First Aid & CPR 1/31/13
1515028 CV First Aid & CPR 10/30/12
1569802 CV First Aid & CPR 11/08/12
1570227 CV First Aid & CPR 11/19/12
Select
Cancel
Base GenericChooserSQL

Printing Rosters & Sign-in Sheet

1. From **Home Page**, click **Find a Meeting Product**
2. From the **Subsystem Specific** task category, click **Meeting Registrants**
3. Click **Print Roster or Event Sign In**.

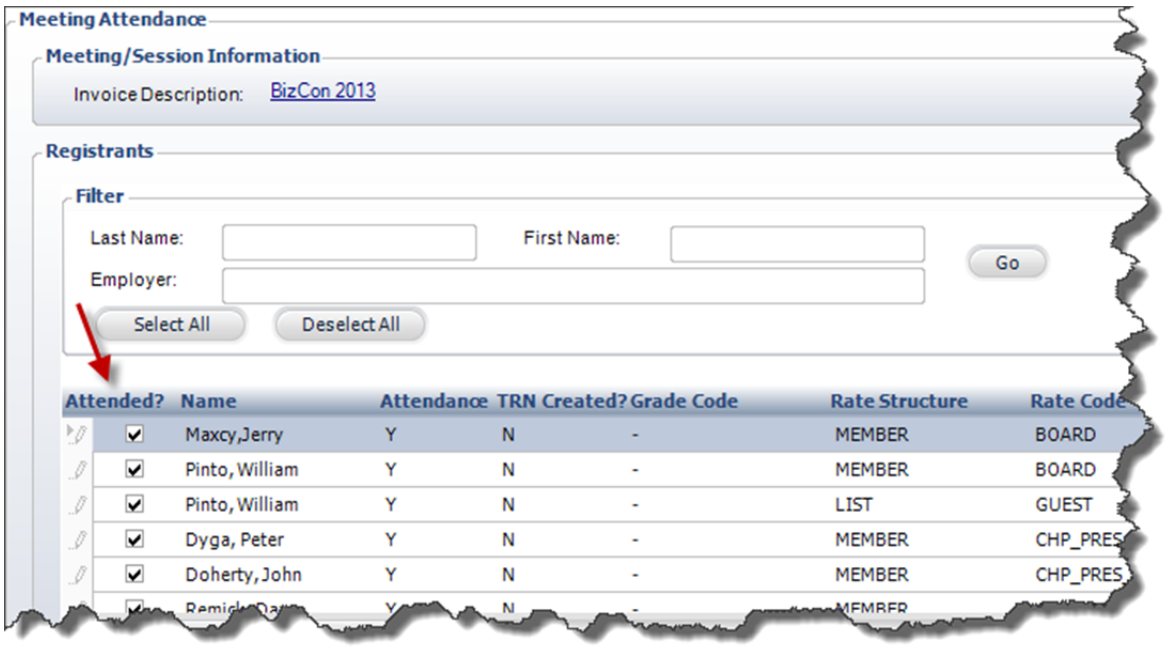


Note: the default view for attendees are Active Registrant, to view attendees in proforma status, click Proforma Registrants.

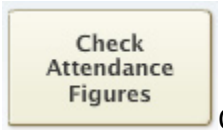
Marking Attendance

Once the meeting is over, you can mark attendance for all attendees.

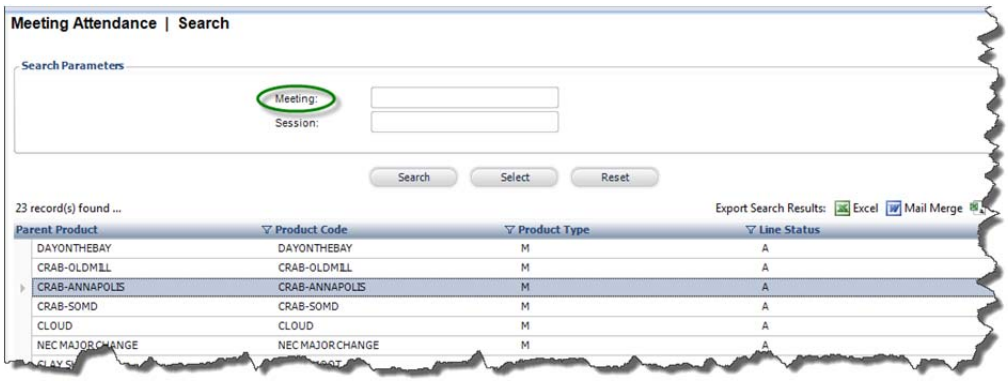
1. From **Home Page**, click **Find a Product**.
2. Click **Subsystem Specific** > **Meeting Attendance**.

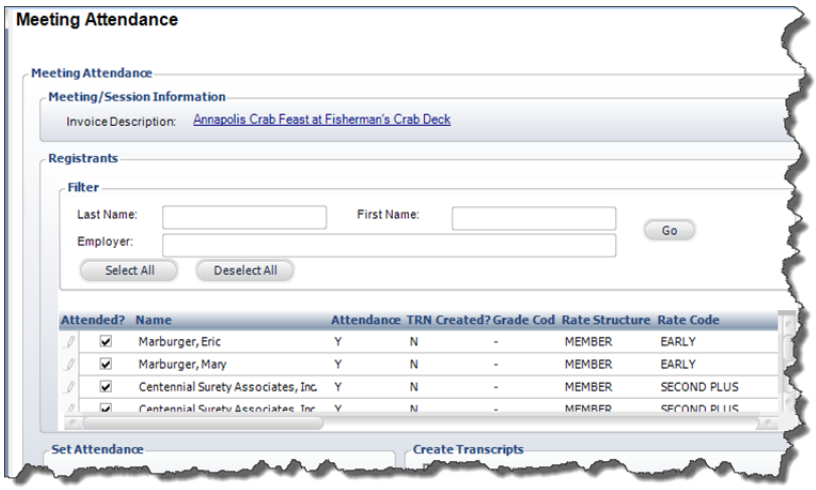


Check Attendance Figures



Once the meeting is over, you can update attendance for all attendees.

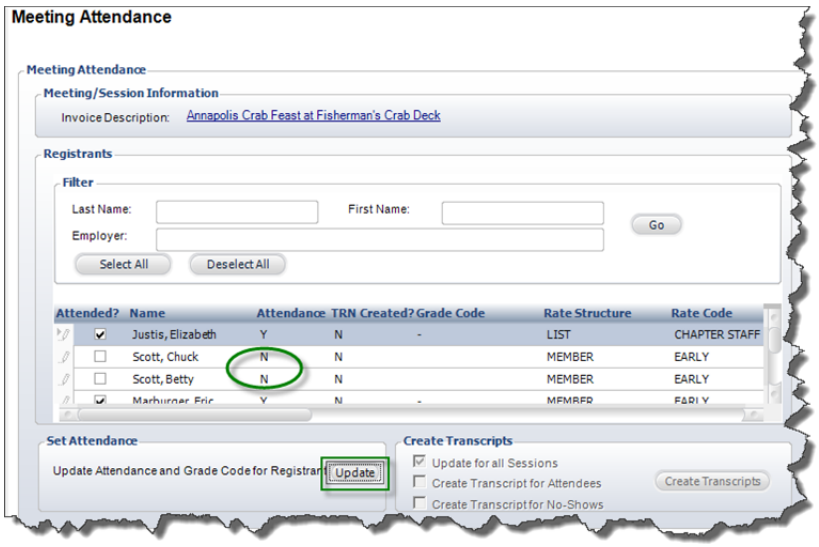




Updating the Attendance for a Meeting or Session

You can indicate if the registrants attended the meeting or session and automatically update the grade code for the registrants using this screen. You can also create transcripts for all sessions, all attendees, and/or no-shows.

1. From the Subsystem Specific task category on the **Meeting Product Maintenance** screen, click **Meeting Attendance**. The Meeting Attendance screen displays, as shown below. By default, all registrants display as "Attended".



2. If necessary, enter any Filter information and click Go. The registrants matching the filter criteria display.
3. Select the checkbox next to the registrant(s) you want to update as having attended the meeting.
4. Alternatively, click **Select All** or **Deselect All**.
3. Click **Update**.

5. The **Attendance Flag** value changes accordingly.
6. If necessary, select the registrants you want to create a transcript for and click Create Transcripts. You can create a transcript record for:
    a. Registrants (a product education record must be defined and the Transcript Created checkbox must be unchecked)
    b. Attendees where the Attendance checkbox is unchecked
    c. No-Shows to the meeting
7. Click **Save**.

Creating a Receipt for a Meeting Product Order

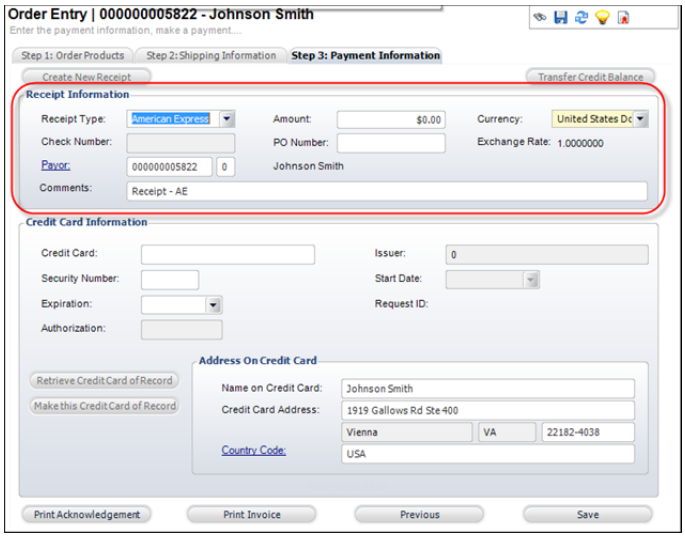
Once a meeting product(s) has been **added to the order** and **shipping information** has been defined where necessary, a receipt for the order should be created. If a batch is not currently open, you are prompted to open a batch for processing. Click "Yes" and select the batch from the list.

1. Access the **Step 3: Payment Information** tab.

    IF A BATCH IS NOT CURRENTLY OPEN, YOU ARE PROMPTED TO OPEN A BATCH FOR PROCESSING. CLICK "YES" AND SELECT THE BATCH FROM THE LIST.
2. Click Create New Receipt.

    If applicable, click Transfer Credit Balance to view any unapplied receipts or credit balances for the bill-to customer and apply the amount(s) available to the order. Only posted receipts will display.

3. From the Receipt Information section (highlighted below), enter the appropriate information:



a. Select the Receipt Type from the drop-down.
b. Available receipt type options are defined for the org unit of the logged in user. For more information, please see Defining Organization Unit Receipt Types and Cash Accounts.
c. Verify the Amount is correct.
d. Change the Currency, if necessary.

Please note that changing the Currency may result in a change to the Amount.

e. If you selected "Check", enter the Check Number.
f. If you selected "Check" or "Cash", enter the PO Number.
g. Enter the Payor or click the link and search for a payor. The payor is the individual, customer, company, or committee who pays for the order, who may not necessarily be the customer.

You can change the bill-to customer on the Step 2: Shipping Information tab instead. This changes the Payor automatically.

h. Enter any Comments as necessary.

4. From the Credit Card Information section (highlighted below), enter payment information if a credit card was selected as the Receipt Type:
   a. Verify that the appropriate credit card is selected as the Receipt Type in the Receipt Information section above.

Alternatively, if credit card information is on file for the customer, click Retrieve Credit Card of Record to automatically populate the appropriate information.

   b. Enter the Credit Card number.
   c. Enter the Issuer.
   d. Enter the Security Number. This number is typically three digits and is located on the back of the credit card.
   e. Select the Start Date and Expiration date from the drop-downs.
   f. Enter the Authorization number.
   g. Verify the Address on Credit Card is correct. If not, then modify it.

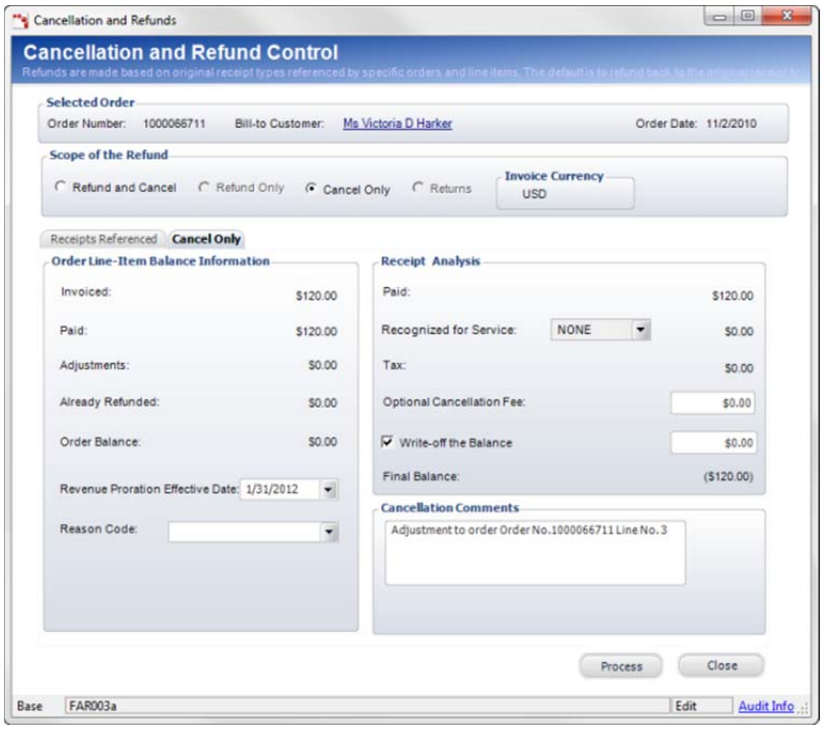
If you would like to save the credit card information on record for future use, click the Make this Credit Card of Record.

5. Click **Save**.

Cancelling a Meeting Order without a Refund

Cancelling an order, without also **refunding the order**, results in a credit balance on the order. That credit balance can then be transferred to another order, if necessary. The credit balance is displayed in parentheses as the Final Balance in the Receipt Analysis section of the Cancellation and Refunds screen.

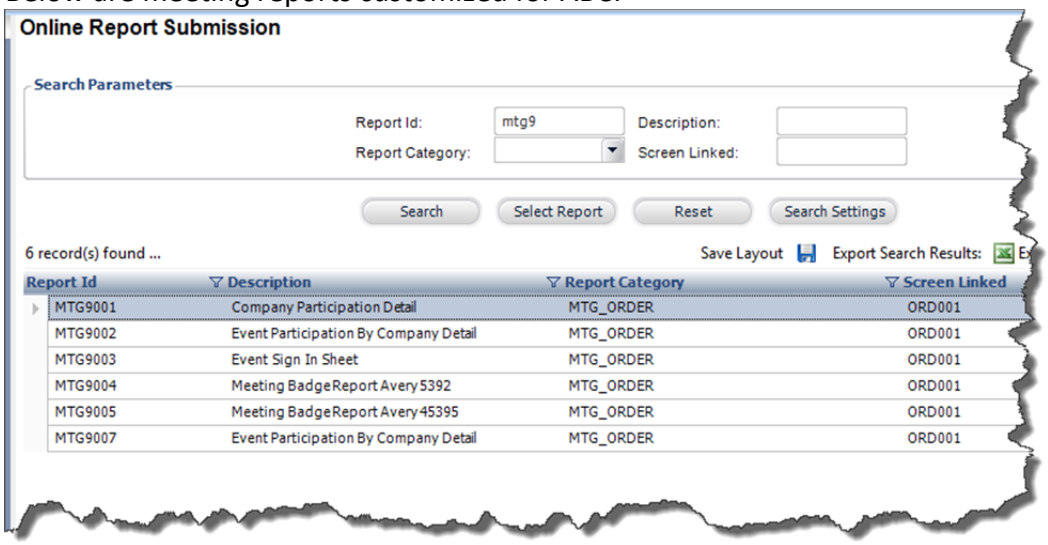
1. On the **Order Entry** screen, click **Cancel an Item** from the **Work with Line Items** task category or **Cancel an Order** from the **Work with Orders** task category.
2. The Cancellation and Refunds screen is displayed, as shown below.



3. From the **Scope of the Refund** section, select the **Cancel Only** radio button.
4. On the **Receipts Referenced** tab, highlight the appropriate receipt.
5. On the **Cancel Only** tab, select the **Revenue Proration Effective Date**.
6. Select the **Reason Code** from the drop-down and enter **Cancellation Comments**.
7. If you check the **Write-off the Balance** checkbox, then enter the amount of the write-off in the text box.
8. If necessary, enter any **Cancellation Comments**.
9. Click **Process**. The Cancellation and Refunds screen closes and the status of the exhibition order line changes to "Cancelled".

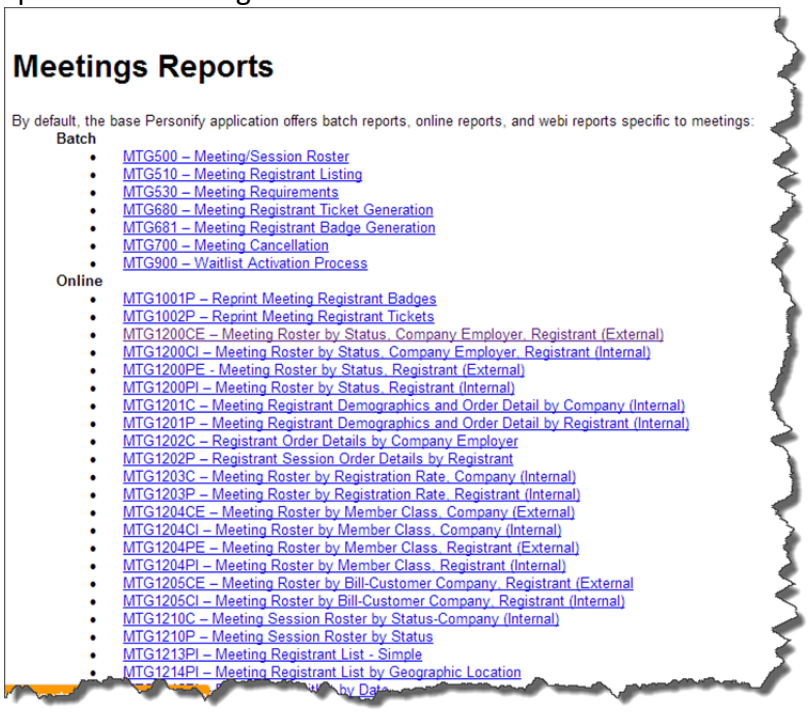
Meeting Reports (ABC)

Below are meeting reports customized for ABC.



Meeting Reports (Personify)

By default, the base Personify application offers batch reports, online reports, and webi reports specific to meetings.

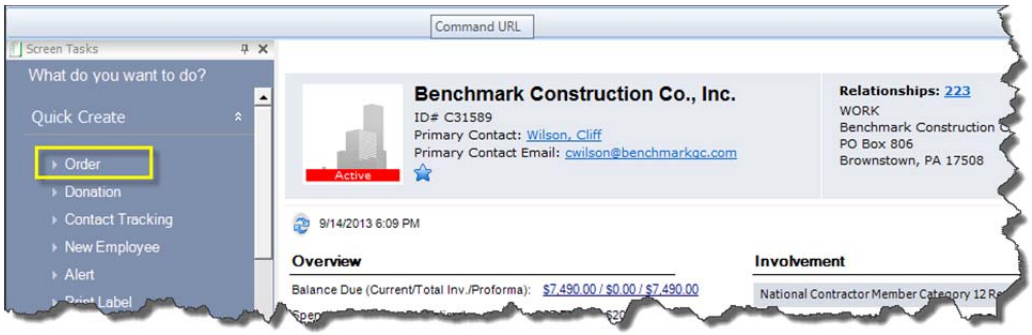

Meetings Reports
By default, the base Personify application offers batch reports, online reports, and webi reports specific to meetings:
Batch
MTG500 – Meeting/Session Roster
MTG510 – Meeting Registrant Listing
MTG530 – Meeting Requirements
MTG680 – Meeting Registrant Ticket Generation
MTG681 – Meeting Registrant Badge Generation
MTG700 – Meeting Cancellation
MTG900 – Waitlist Activation Process
Online
MTG1001P – Reprint Meeting Registrant Badges
MTG1002P – Reprint Meeting Registrant Tickets
MTG1200CE – Meeting Roster by Status, Company Employer, Registrant (External)
MTG1200CI – Meeting Roster by Status, Company Employer, Registrant (Internal)
MTG1200PE - Meeting Roster by Status, Registrant (External)
MTG1200PI – Meeting Roster by Status, Registrant (Internal)
MTG1201C – Meeting Registrant Demographics and Order Detail by Company (Internal)
MTG1201P – Meeting Registrant Demographics and Order Detail by Registrant (Internal)
MTG1202C – Registrant Order Details by Company Employer
MTG1202P – Registrant Session Order Details by Registrant
MTG1203C – Meeting Roster by Registration Rate, Company (Internal)
MTG1203P – Meeting Roster by Registration Rate, Registrant (Internal)
MTG1204CE – Meeting Roster by Member Class, Company (External)
MTG1204CI – Meeting Roster by Member Class, Company (Internal)
MTG1204PE – Meeting Roster by Member Class, Registrant (External)
MTG1204PI – Meeting Roster by Member Class, Registrant (Internal)
MTG1205CE – Meeting Roster by Bill-Customer Company, Registrant (External
MTG1205CI – Meeting Roster by Bill-Customer Company, Registrant (Internal)
MTG1210C – Meeting Session Roster by Status-Company (Internal)
MTG1210P – Meeting Session Roster by Status
MTG1213PI – Meeting Registrant List - Simple
MTG1214PI – Meeting Registrant List by Geographic Location

Create a Membership Order

A customer can have multiple orders such as a membership order and a meeting registration. Orders will have a status of **Active** or **Proforma**!

> ***• Proforma – No financials will be associated with the order. The customer has indicated intent to purchase, but no commitment is associated with this action.***
>
> ***• Active – Financials will be associated with the order. The customer has indicated a firm commitment to purchasing the product.***

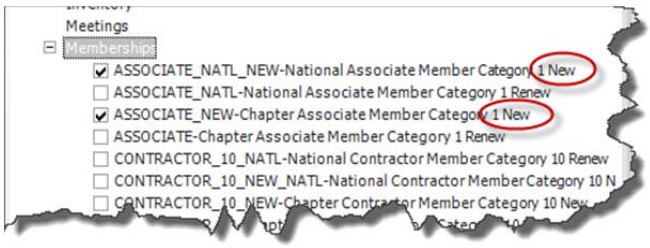
1. First locate the customer you'd like to place the order for, and then click **Order** from the Screen Task bar.



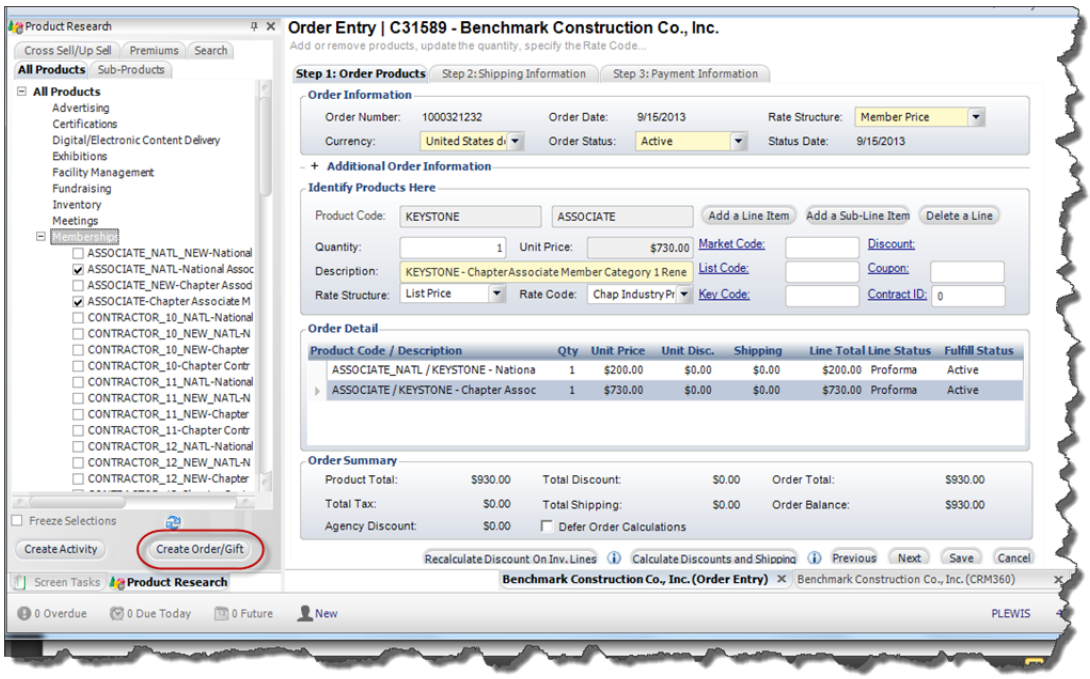
2. From the **Product Research**, expand **All Products** and then **Memberships.**
3. Select the appropriate membership.

> Note: You will have at least two line items, one for the Chapter and one for National. Voluntary and State products are also optional products which can be added!

4. Make sure you are choosing the correct product; you may want to expand the screen task pane.


Meetings
Memberships
ASSOCIATE_NATL_NEW-National Associate Member Category 1 New
ASSOCIATE_NATL-National Associate Member Category 1 Renew
ASSOCIATE_NEW-Chapter Associate Member Category 1 New
ASSOCIATE-Chapter Associate Member Category 1 Renew
CONTRACTOR_10_NATL-National Contractor Member Category 10 Renew
CONTRACTOR_10_NEW_NATL-National Contractor Member Category 10 N

5. Click the **Create Order/Gift** button.



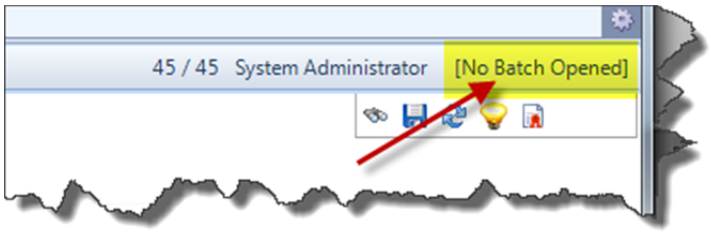
6. Click **Save**.

Applying Payments

Create a New Batch

A batch records the number of payments and payment amounts processed through Personify while the batch is open for editing; this simply lets you organize your daily money transactions. It's suggested you open a batch at the beginning of the day and at the end of the day, you should close and post all open batches.

1. To open a click, click **[No Batch Opened]**



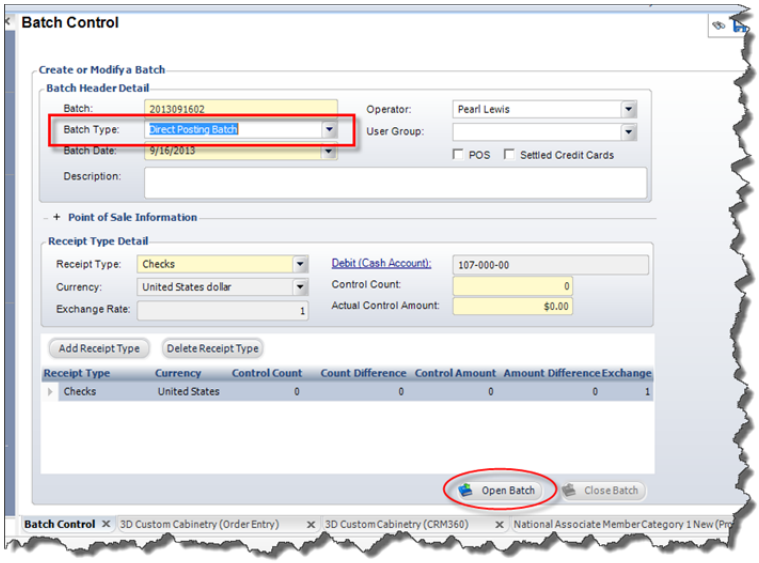
2. Click **Create New Batch**
3. From the **Batch Type**: select **Deferred or Direct Posting Batch**

Batch Types

Difference between direct and deferred posting batches is the line status on an order. Direct posting receipts will change the line status to Active and Deferred posting receipts will keep the line status in Proforma.

When closing out a batch, depending on which type chosen, Direct Posting you must Finalize the Batch and with Deferred Posting you must Post the batch.

4. **Receipt Type** defaults to **Checks**, you can change to Credit Card, if needed.



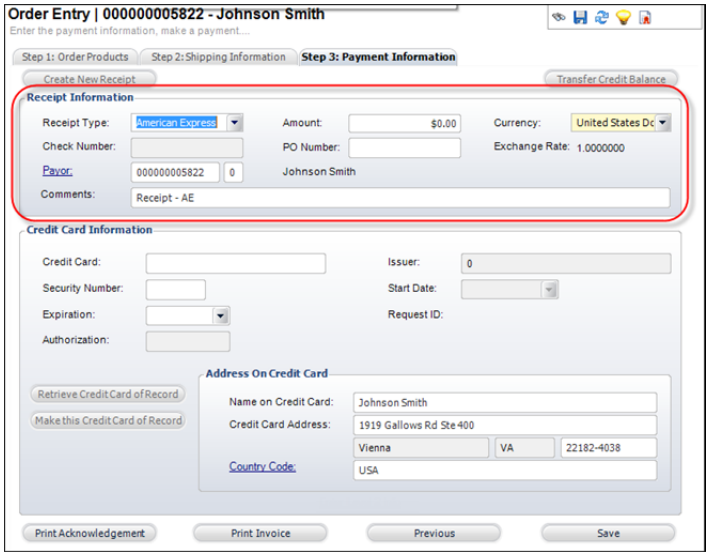
Only one person in a user group can access the batch at one time.

5. Enter a Description and check the appropriate checkboxes.
6. Click **Open Batch**.

Creating a Receipt for a Membership Order

Once a membership product(s) has been added to the order and shipping information has been defined where necessary, a receipt for the order should be created in order to activate the order. A partial or full payment can be made towards the order or, if necessary, a payment schedule can be setup to automatically charge a credit card or debit an electronic fund on a set schedule.

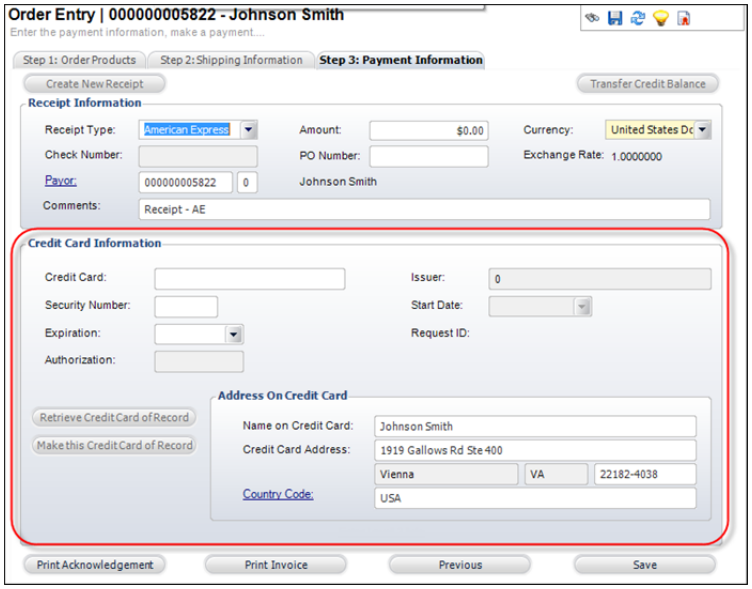
1. Access the **Step 3: Payment Information** tab.
2. If a batch is not currently open, you are prompted to open a batch for processing. Click "Yes" and select the batch from the list.
3. Click **Create New Receipt**.
4. From the Receipt Information section (see below), enter the appropriate information:



5. Select the **Receipt Type** from the drop-down.
   a. The **Amount** defaults to the Order Balance. Change this, if necessary.
   b. If you selected "**Check**", enter the **Check Number**.
   c. If you selected "Check" or "Cash", enter the PO Number.
   d. If the Payor is different from the bill-to customer, click the link and search for a payor.

   The payor is the individual, customer, company, or committee who pays for the order, who may not necessarily be the customer.

   e. Enter any Comments as necessary.
6. If a credit card was selected as the Receipt Type, enter payment information in the Credit Card Information section (highlighted below):



7. Verify that the appropriate credit card is selected as the Receipt Type in the Receipt Information section above.

   Note: Alternatively, if credit card information is on file for the customer, click Retrieve Credit Card of Record to automatically populate the appropriate information.

   a. Enter the Credit Card number.
   b. Enter the Issuer.
   c. Enter the Security Number. This number is typically three digits and is located on the back of the credit card.
   d. Select the Start Date and Expiration date from the drop-downs.
   e. Enter the Authorization number.
   f. Verify the Address on Credit Card is correct. If not, then modify it.

   Note: If you would like to save the credit card information on record for future use, click the Make this Credit Card of Record.

6. Click **Save**.

   A message is displayed that the payment has been applied to the order and the order becomes Active.

Membership now begins!

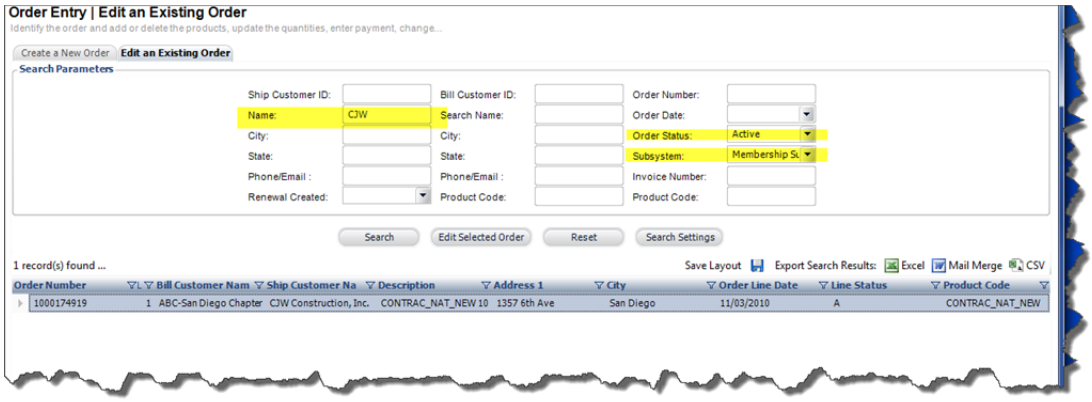
Working with Orders

The Order Entry screen lets you place orders and track activities for products and memberships. For example, you can create an order for a membership, or a meeting event. A customer can have multiple orders such as renewing a membership and registering the customer for a meeting.

> Below instructions will show you how to renew membership orders on an individual basis. Personify has a batch process which is ran during dues renewal season called ORD650 and MBR655. ORD650 creates the renewals for ALL active membership orders.

Searching for Existing Orders

1. From the **Home Page** click **Find an Order**
2. Click the **Edit an Existing Order** tab
3. Enter necessary criteria, for example "Search Name", "Product Code", "Order Status", or "Subsystem" of Membership.

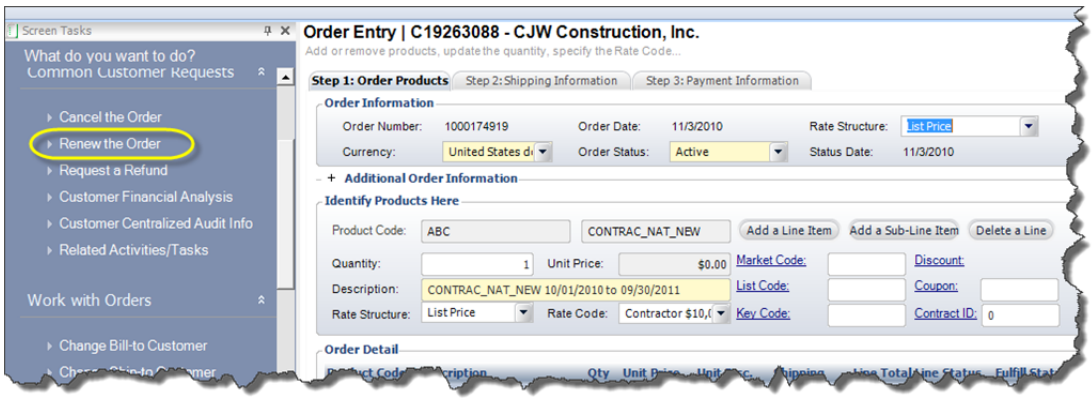


Renewing Orders for Second Year

Any company that joins pays for a full year, then when they renew for their second year the pro-rate happens.

> We have automated the second year pro-rate for membership orders.

1. From the **Home Page**, click **Find an order**
2. From **Common Customer Request**, click **Renew the Order**; the order is automatically renewed with the correct begin and end dates.

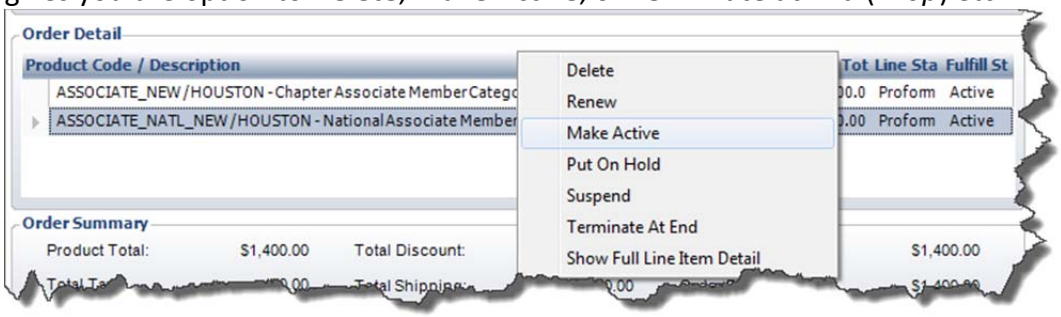


3. Renewed orders will renew in proforma status, this gives you the option to make any necessary changes a membership may have.

Next section reviews how to modify orders.

Modify Orders

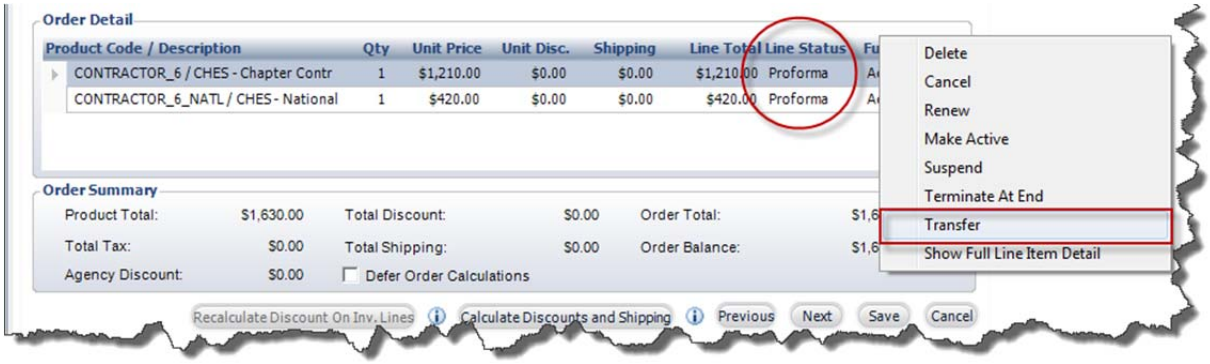
Once you've created an order, you can make changes to the order. Right clicking on a line item gives you the option to **Delete**, **Make Active**, or **Terminate at End** (*Drop*) etc.



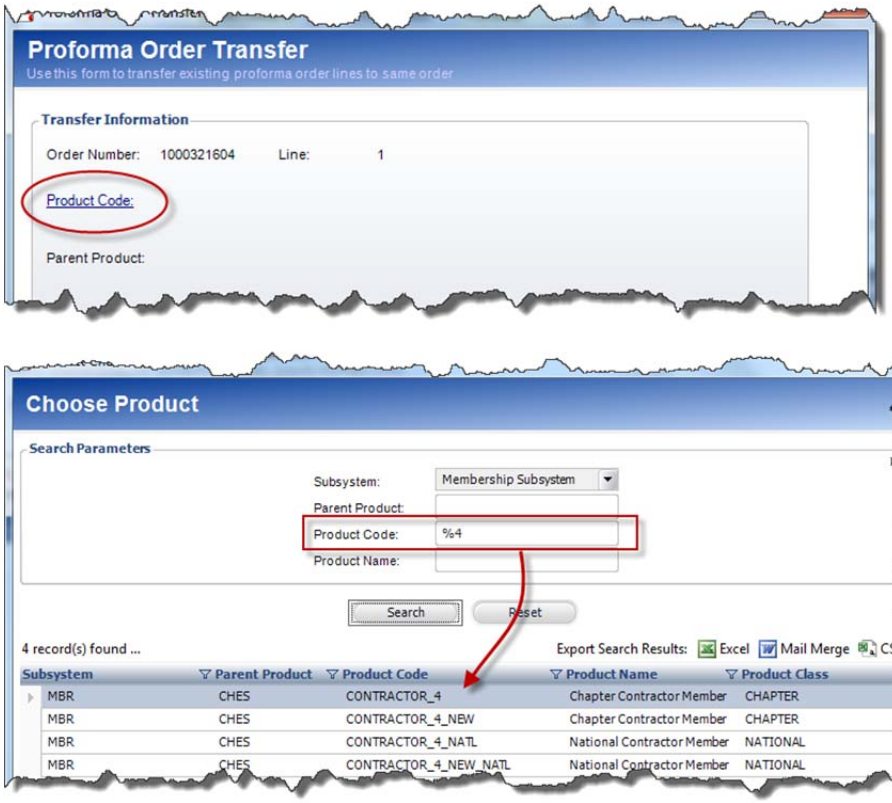
Change Category UP/DOWN

Below is a best practice for transferring Proforma orders, you will follow this process after renewing the original order; because your member needs to change category UP or DOWN. This process also ensures your pro-rate is applied to the new line item and alleviates you having to modify begin and end dates.

1. Select each line items, **right-click** and choose **Transfer.**



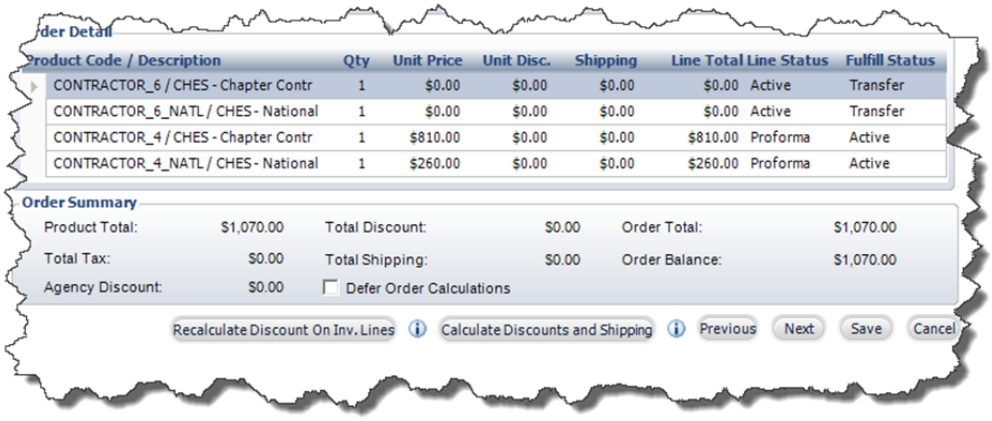
2. Click the **Product Code** link and choose the category you're transferring UP or DOWN to.



3. The newly added category lines will show a Line status of **Proforma** and a Fulfill Status of **Active**. The previous line items are zero dollars with a Fulfill Status of **Transfer**.
4. Click **Save**.

Product Code / Description	Qty	Unit Price	Unit Disc.	Shipping	Line Total	Line Status	Fulfill Status
CONTRACTOR_6 / CHES - Chapter Contr	1	$0.00	$0.00	$0.00	$0.00	Active	Transfer
CONTRACTOR_6_NATL / CHES - National	1	$0.00	$0.00	$0.00	$0.00	Active	Transfer
CONTRACTOR_4 / CHES - Chapter Contr	1	$810.00	$0.00	$0.00	$810.00	Proforma	Active
CONTRACTOR_4_NATL / CHES - National	1	$260.00	$0.00	$0.00	$260.00	Proforma	Active

5. You now have a newly created Membership line item.


der Detail
Product Code / Description Qty Unit Price Unit Disc. Shipping Line Total Line Status Fulfill Status
CONTRACTOR_6 / CHES - Chapter Contr 1 $0.00 $0.00 $0.00 $0.00 Active Transfer
CONTRACTOR_6_NATL / CHES - National 1 $0.00 $0.00 $0.00 $0.00 Active Transfer
CONTRACTOR_4 / CHES - Chapter Contr 1 $810.00 $0.00 $0.00 $810.00 Proforma Active
CONTRACTOR_4_NATL / CHES - National 1 $260.00 $0.00 $0.00 $260.00 Proforma Active
Order Summary
Product Total: $1,070.00 Total Discount: $0.00 Order Total: $1,070.00
Total Tax: $0.00 Total Shipping: $0.00 Order Balance: $1,070.00
Agency Discount: $0.00 Defer Order Calculations
Recalculate Discount On Inv. Lines
Calculate Discounts and Shipping
Previous
Next
Save
Cancel

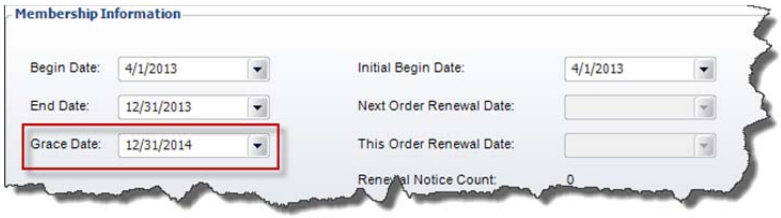
Dropping a Member

1. Right-click on both line items
2. Select **Terminate At End**

Non-Member Pricing

To insure that dropped companies do not get member pricing when they sign up for an event, update the grace date, on the current membership order, to the end date of membership.

1. Right-click on both line items and select **Show Full Line Item Detail**
2. Click the **Product Specifics** tab



Applying a 15 for 12 month Discount

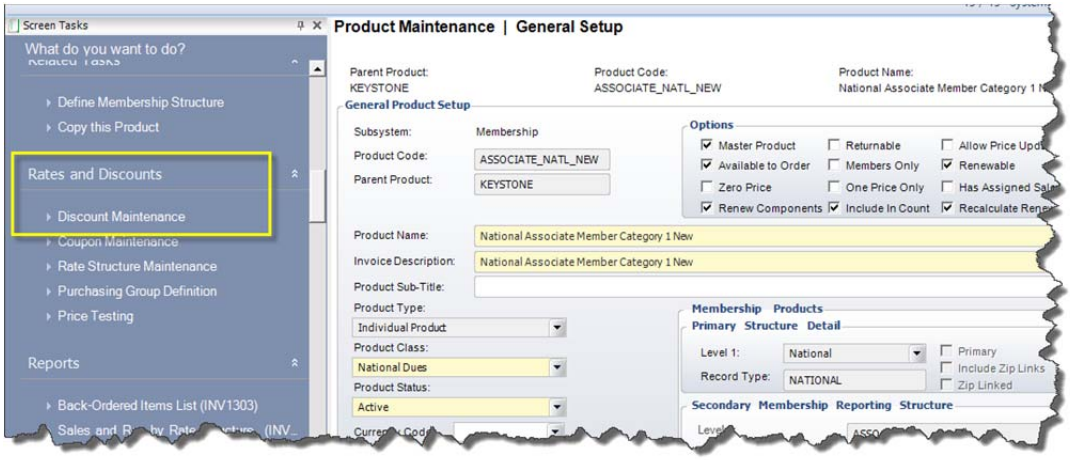
When a member joins in November and you are going to give them 15 months for the price of 12; in Personify you will bill the member full dues in Nov by selling them a new member product. In January or during the dues renewal process, renew the member (*Personify will calculate the pro-rate* for you).

For new member's joining in October/November and receiving the discount of 15 for 12, you have to the option to apply a discount.

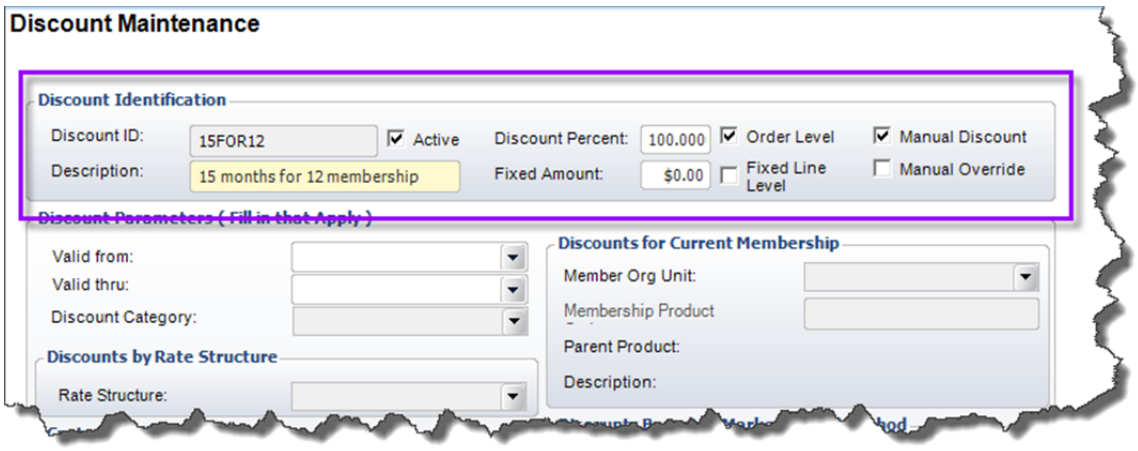
Setting up the Discount

Apply a discount, the description can be called “15 for 12” with a fixed amount of $0; the remaining balance disappears and will be replaced with $0 on the order. The member is renewed, recognized as a member, but nothing hits the A/R and they owe nothing. Next year, member’s order will automatically renew to the appropriate category at full price.

1. Find and open a “New” membership product, e.g. Associate Member
2. From the task bar, click **Rates and Discounts** > **Discount Maintenance.**



3. Click **Create New Product Discount**.
4. Fill out the **Discount ID**: field, e.g. 15FOR12
5. Fill out the **Description**: field, e.g. 15 month for 12 membership
6. Enter 100 in the **Discount Percent** box.
7. Check the **Order Level** check box.
8. Check the **Manual Discount** check box.

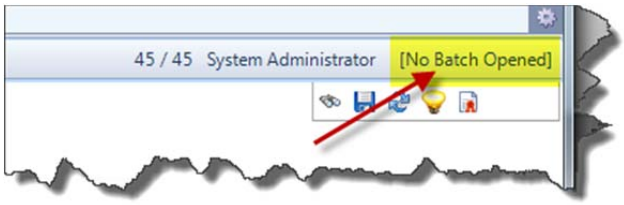


Applying Payments

Create a New Batch

A batch records the number of payments and payment amounts processed through Personify while the batch is open for editing; this simply lets you organize your daily money transactions. It's suggested you open a batch at the beginning of the day and at the end of the day, you should close and post all open batches.

7. To open a click, click **[No Batch Opened]**



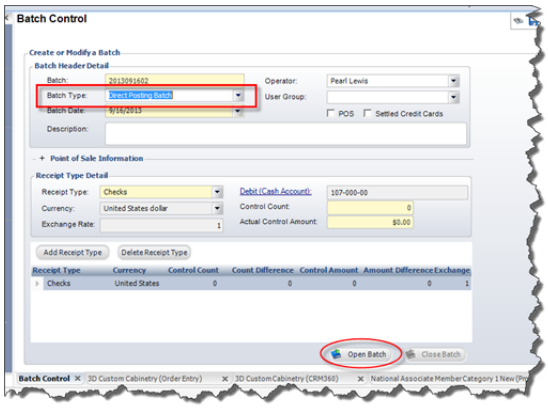
8. Click **Create New Batch**
9. From the **Batch Type**: select **Deferred or Direct Posting Batch**

Batch Types

Difference between direct and deferred posting batches is the line status on an order. Direct posting receipts will change the line status to Active and Deferred posting receipts will keep the line status in Proforma.

When closing out a batch, depending on which type chosen, Direct Posting you must Finalize the Batch and with Deferred Posting you must Post the batch.

10. **Receipt Type** defaults to **Checks**, you can change to Credit Card, if needed.



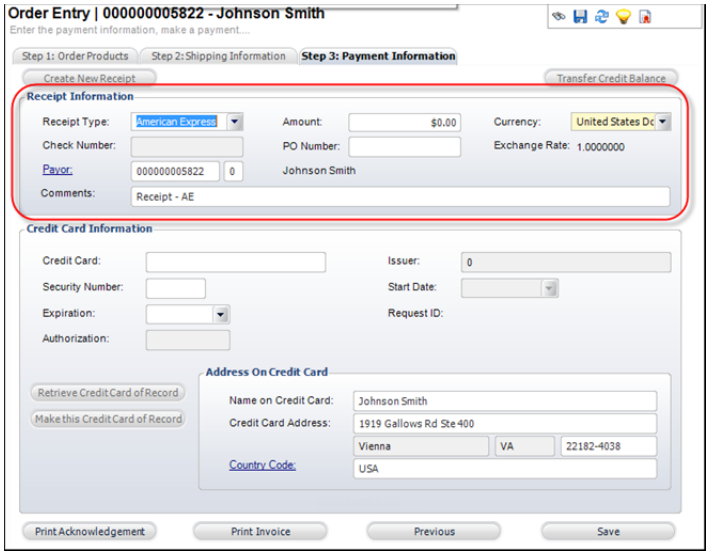
Only one person in a user group can access the batch at one time.

11. Enter a Description and check the appropriate checkboxes.
12. Click **Open Batch**.

Creating a Receipt for a Membership Order

Once a membership product(s) has been added to the order and shipping information has been defined where necessary, a receipt for the order should be created in order to activate the order. A partial or full payment can be made towards the order or, if necessary, a payment schedule can be setup to automatically charge a credit card or debit an electronic fund on a set schedule.

8. Access the **Step 3: Payment Information** tab.
9. If a batch is not currently open, you are prompted to open a batch for processing. Click "Yes" and select the batch from the list.
10. Click **Create New Receipt**.
11. From the Receipt Information section (see below), enter the appropriate information:

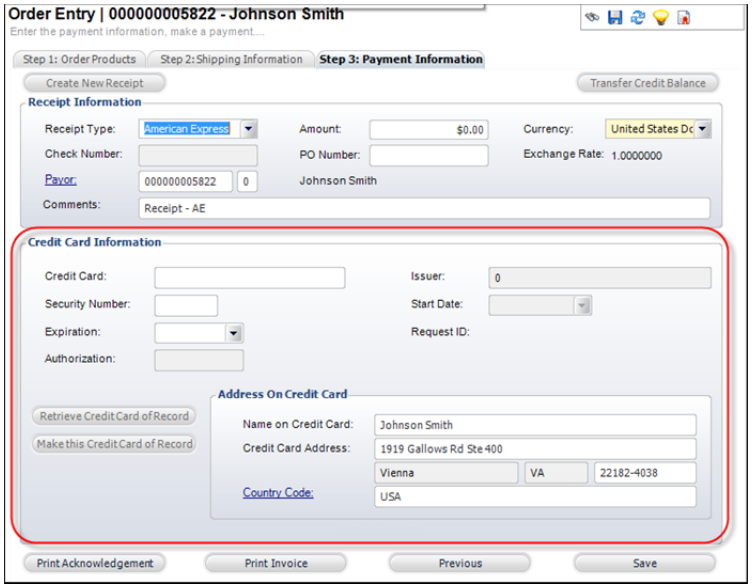


12. Select the **Receipt Type** from the drop-down.
    f. The **Amount** defaults to the Order Balance. Change this, if necessary.
    g. If you selected "**Check**", enter the **Check Number**.
    h. If you selected "Check" or "Cash", enter the PO Number.
    i. If the Payor is different from the bill-to customer, click the link and search for a payor.

The payor is the individual, customer, company, or committee who pays for the order, who may not necessarily be the customer.

j. Enter any Comments as necessary.

13. If a credit card was selected as the Receipt Type, enter payment information in the Credit Card Information section (highlighted below):



14. Verify that the appropriate credit card is selected as the Receipt Type in the Receipt Information section above.

Note: Alternatively, if credit card information is on file for the customer, click Retrieve Credit Card of Record to automatically populate the appropriate information.

g. Enter the Credit Card number.
h. Enter the Issuer.
i. Enter the Security Number.
j. Select the Start Date and Expiration date from the drop-downs.
k. Enter the Authorization number.

Note: If you would like to save the credit card information on record for future use, click the Make this Credit Card of Record.

6. Click **Save**.

A message is displayed that the payment has been applied to the order and the order becomes Active.

Renewed membership now begins!

Applying Payments

Create a New Batch

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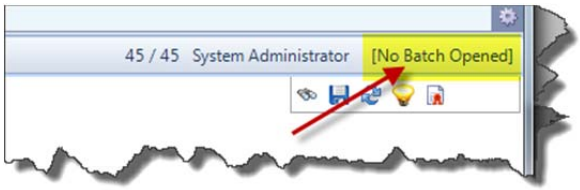

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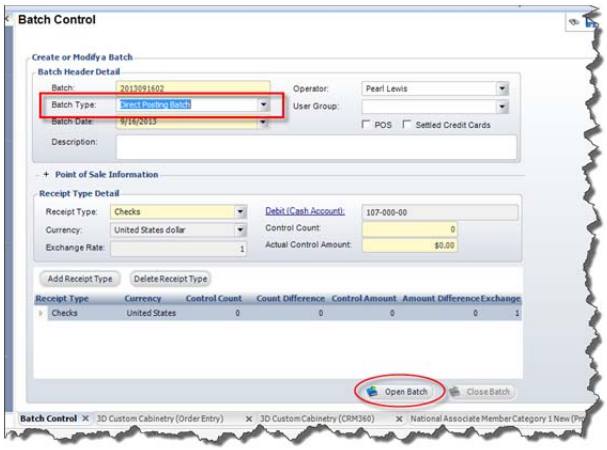

Only one person in a user group can access the batch at one time.

17. Enter a Description and check the appropriate checkboxes.
18. Click **Open Batch**.

Creating a Receipt for a Membership Order

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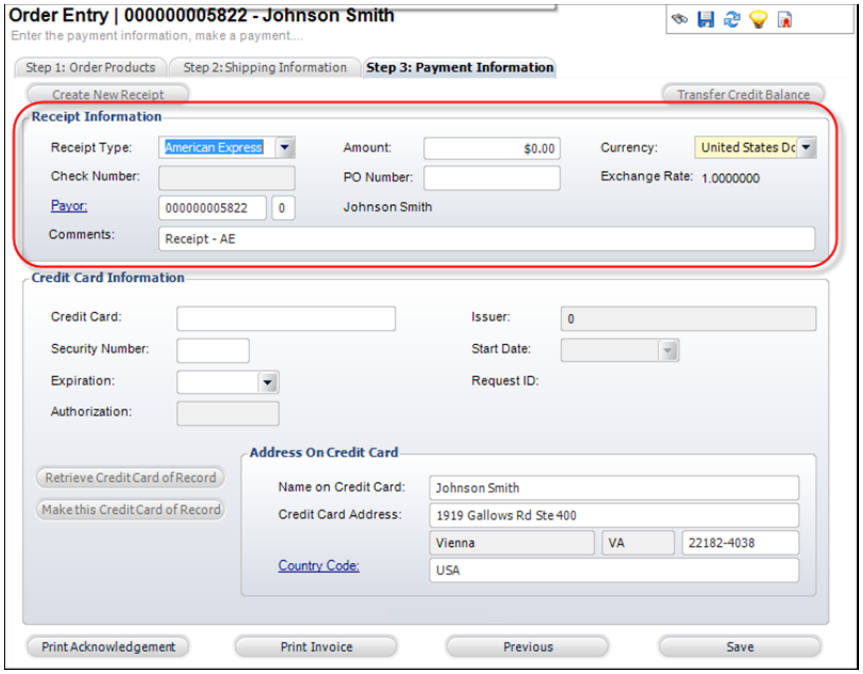
15. Access the **Step 3: Payment Information** tab.
16. If a batch is not currently open, you are prompted to open a batch for processing. Click "Yes" and select the batch from the list.
17. Click **Create New Receipt**.
18. From the Receipt Information section (highlighted below), enter the appropriate information:

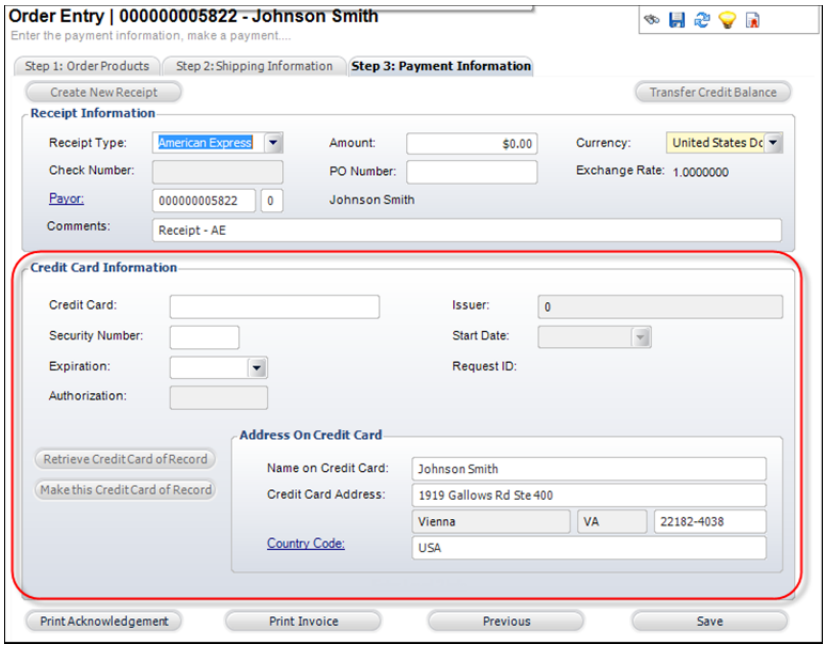


19. Select the **Receipt Type** from the drop-down.
    k. The **Amount** defaults to the Order Balance. Change this, if necessary.
    l. If you selected "**Check**", enter the **Check Number**.
    m. If you selected "Check" or "Cash", enter the PO Number.
    n. If the Payor is different from the bill-to customer, click the link and search for a payor.

The payor is the individual, customer, company, or committee who pays for the order, who may not necessarily be the customer.

o. Enter any Comments as necessary.

20. If a credit card was selected as the Receipt Type, enter payment information in the Credit Card Information section (highlighted below):



21. Verify that the appropriate credit card is selected as the Receipt Type in the Receipt Information section above.

Note: Alternatively, if credit card information is on file for the customer, click Retrieve Credit Card of Record to automatically populate the appropriate information.

l. Enter the Credit Card number.
m. Enter the Issuer.
n. Enter the Security Number. This number is typically three digits and is located on the back of the credit card.
o. Select the Start Date and Expiration date from the drop-downs.
p. Enter the Authorization number.
q. Verify the Address on Credit Card is correct. If not, then modify it.

Note: If you would like to save the credit card information on record for future use, click the Make this Credit Card of Record.

6. Click **Save**.

A message is displayed that the payment has been applied to the order and the order becomes Active.

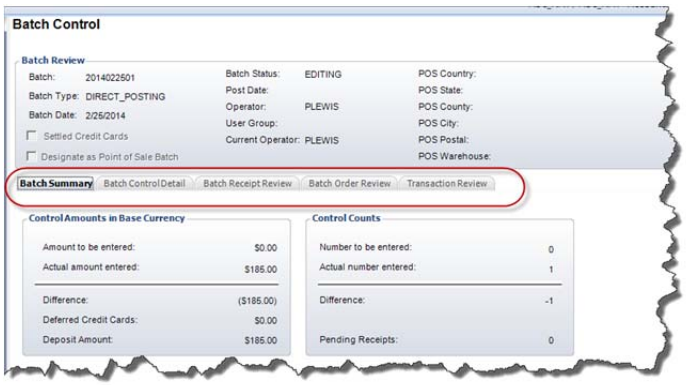
WORKING WITH BATCHES

Reviewing a Batch

1. Select Accounting > Batch Control from the toolbar.
2. Search for a batch and double-click it.

> ***If you have a batch open, this screen displays automatically when you click Batch Control.***

3. Review the information on the tabs:

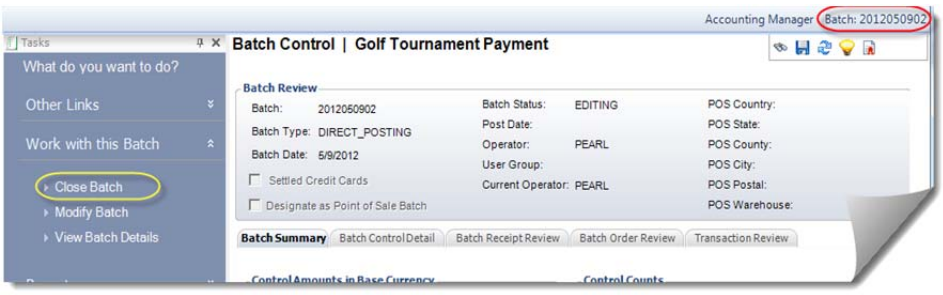


- ✓ **Batch Summary** - displays the control amounts and control counts of the batch(es). The counts and amounts only reflect the non-cancelled receipts.
- ✓ **Batch Control Detail** – displays payment methods, cash accounts, currencies, and where applicable, control counts and control amounts.
- ✓ **Batch Receipt Review** – displays batch receipts, including payment information, receipt types, receipt amounts, statuses, and payers. When you click the + next to the receipt, the order details display by line number. You can right-click a line item to reverse a receipt, open the receipt in the Receipt Review screen, or delete an unposted receipt.
- ✓ **Batch Order Review** – displays all orders created within the active batch.
- ✓ **Transaction Review** – displays all financial transactions associated with an order.

4. Select a task from the Work with This Batch task category.

Closing a batch

When a batch is closed, no one else can work on the batch until it is re-opened by the same user (or a different user is assigned to it). Batches should be closed by users at the end of every day.



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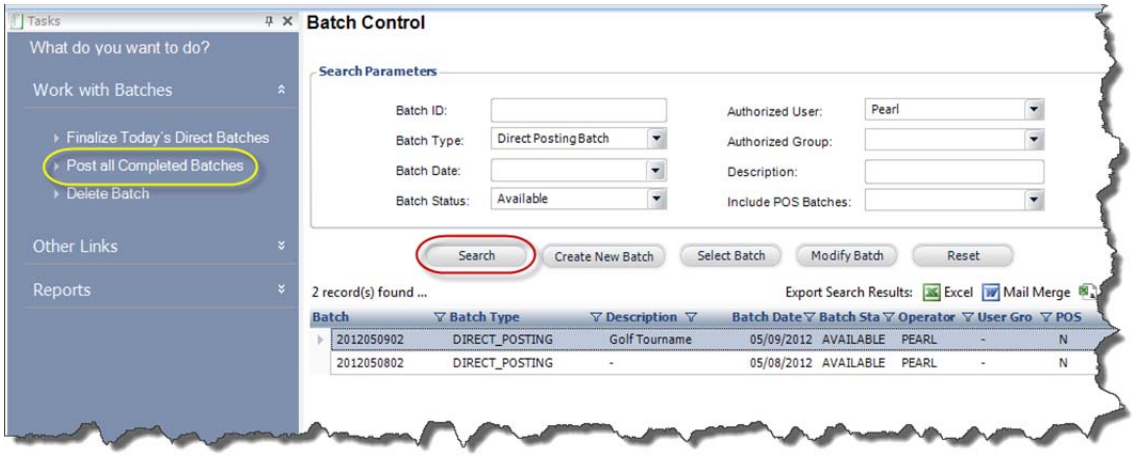
Finalize, Post or Delete a batch

On the Batch Control search screen, enter the appropriate search parameters and click Search. Using the task bar on the search screen, you can perform the following:

- ✓ **Finalize Today's Direct Batches** – when clicked, a message displays saying all the batches were closed successfully. If any error occurs, the system informs you.
- ✓ **Post all Completed Deferred Batches** – when clicked, a message displays saying all completed deferred batches were posted successfully. If any error occurs, the system informs you.
- ✓ **Delete Batch** – when clicked, a message displays saying the batch was deleted successfully. If any error occurs, the system informs you.



Introduction

Partial payment processing is necessary when a member gives you money but not enough to pay the full dues amount. Partial payments should be applied to the National product first, and then the Chapter portion should be paid second.

If your membership product setups are correct for short paying dues, the Chapter line will stay in Proforma status even if a partial payment is applied to it. The code should be set to "**Do not activate Order unless fully paid**" on the rate code, in the short pay option. When a second payment is applied the chapter line is affected but no AR is created.

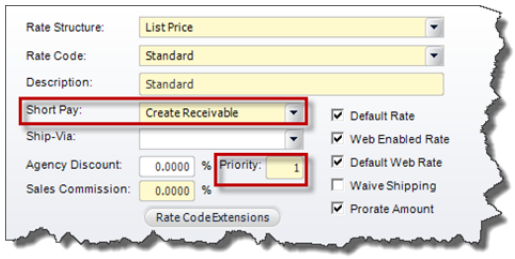
When a partial payment order has been processed, you should then run the ORD660 Invoice to bill for the remaining balance due. This can be launched as a batch for all open invoices or from the Order Entry screen.

Q: What settings should my membership "Short Pay:" products be set to?

A: Per ABC policy, below setup should be as follows:

National Products

- ✓ Select **AR: Create Receivable** from the Short Pay drop down menu
- ✓ GL Accounts should be set to **pay priority** "1" (*this pays National first*)



Chapter Products

- ✓ Select **Reject: Do not active order unless fully paid** from the Short Pay drop down menu
- ✓ GL Accounts should be set to **pay priority** "99"

Note: If payment doesn't meet national's full payment, order will not activate and will not be picked up by ABC200. Once full payment is received, order activates and will be picked up by ABC200!

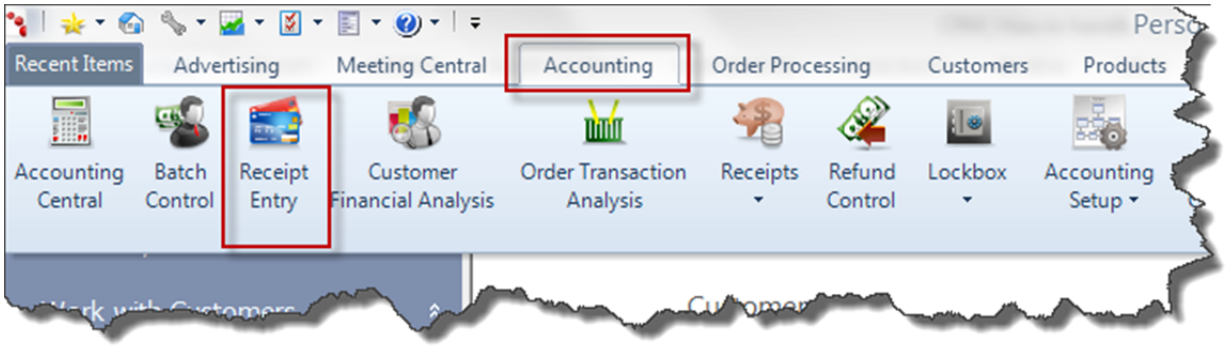
Voluntary Products

- ✓ Select **ADJUST**: "**Accept Whatever is Paid** from the Short Pay drop down menu
- ✓ GL Accounts should be set to **pay priority** "100" (*this payment is last*)

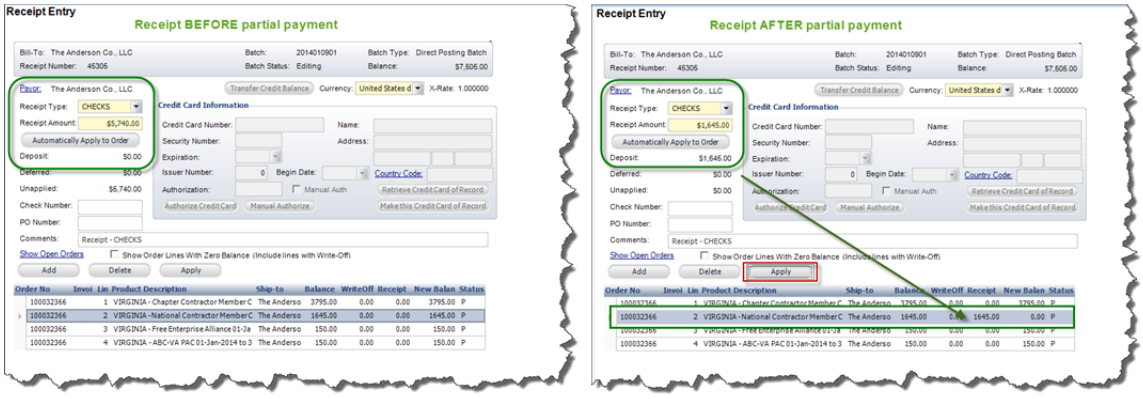
FAQ: Partial Payments

Q: How do I apply partial payment to an entire order?

A: Receipt Entry screen allows you to apply a partial payment to an order, and even select which lines to pay.



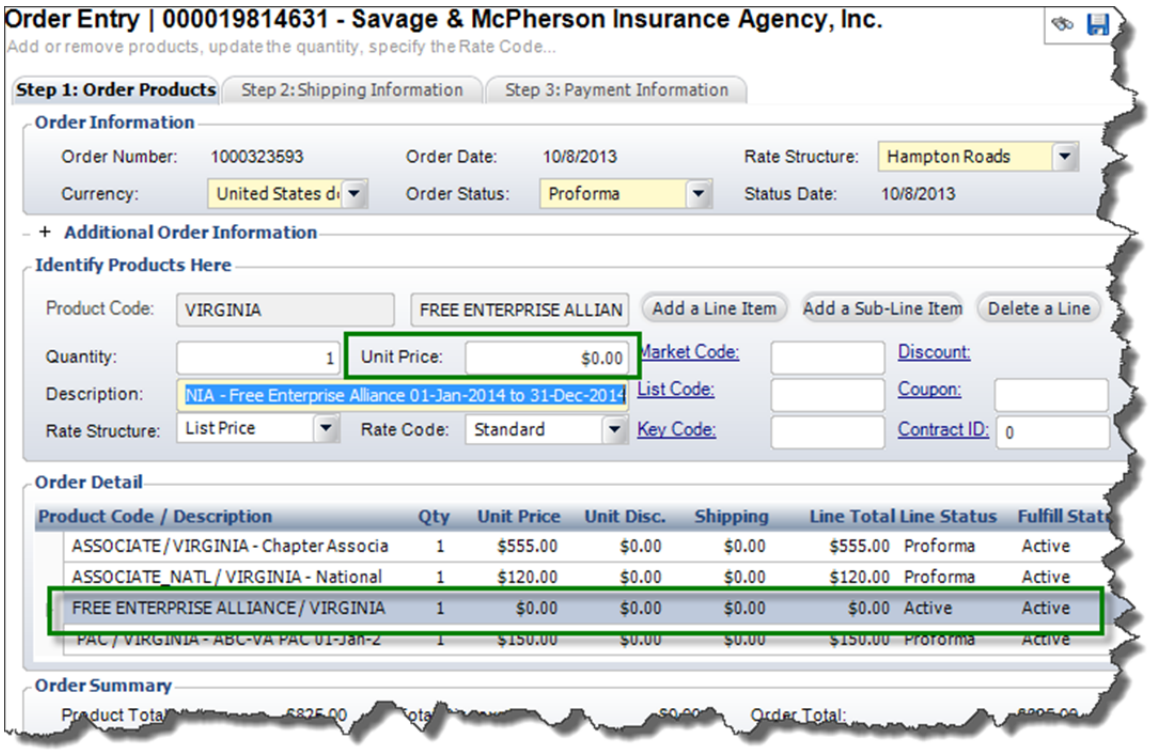
1. Click the **Accounting** menu and select **Receipt Entry**
2. From the **Receipt Entry** screen, enter the amount to be applied in the **Receipt Amount** field
3. Highlight the line item to apply the amount, click **Apply**



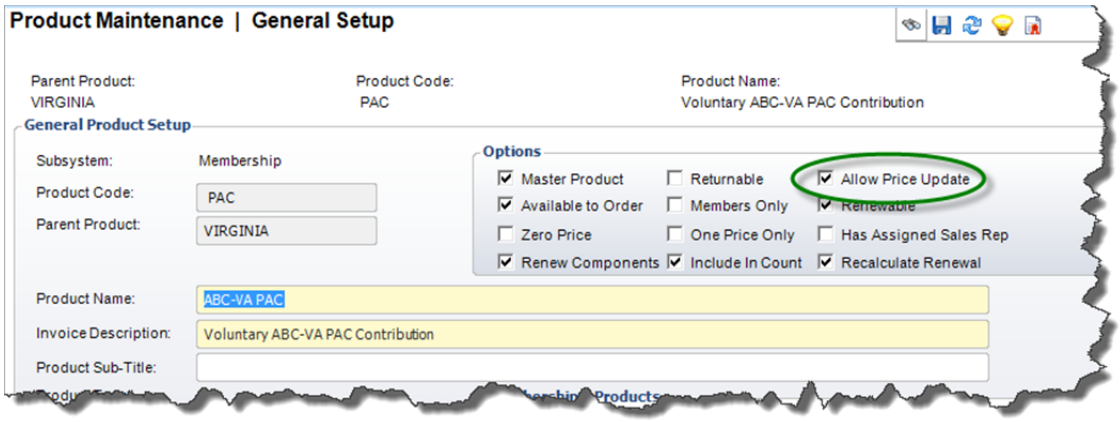
Q: How do I apply payment to just the membership line items and not the voluntary donation line item?

A: Simply apply a $0 payment amount to the Unit Price on the line item.

From the order entry screen, highlight the voluntary donation line, replace the dollar amount within the **Unit Price** field with $0.00. This can also be accomplished by right-clicking on the line item, select **Show Full Line Items** and changing the Unit Price to $0 on the Line Detail tab. Then apply the full payment via the Payment Information tab.



Tip: Make sure the voluntary products are set to 'allow price update'

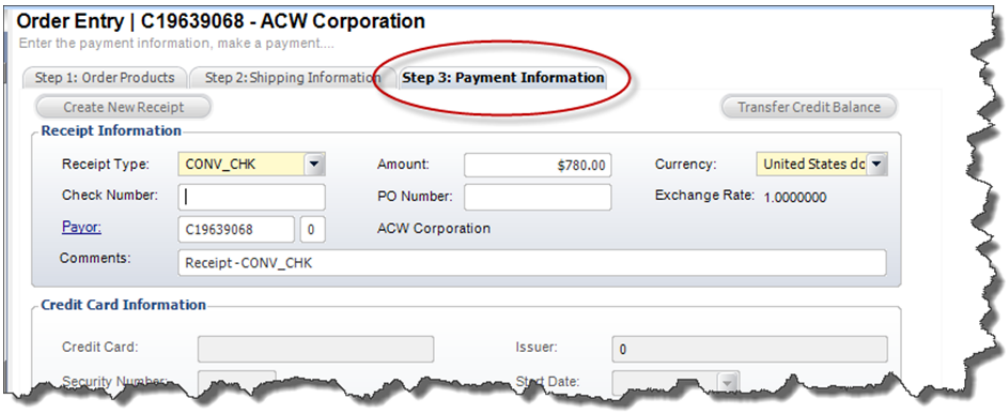


Q: How do I have Personify pay the chapter first and not national?

A: Using Receipt Entry you can pay any line you select regardless of the default setups to pay National first.

Q: How do I apply payment to the entire order?

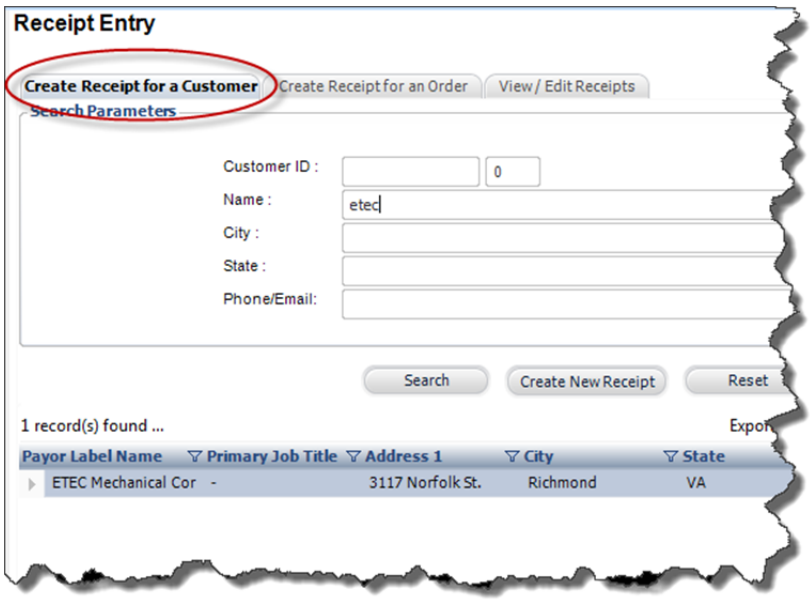
A: The Create New Receipt button on the tab Step 3: Payment Information on the Order Entry screen will apply payment to the entire order.

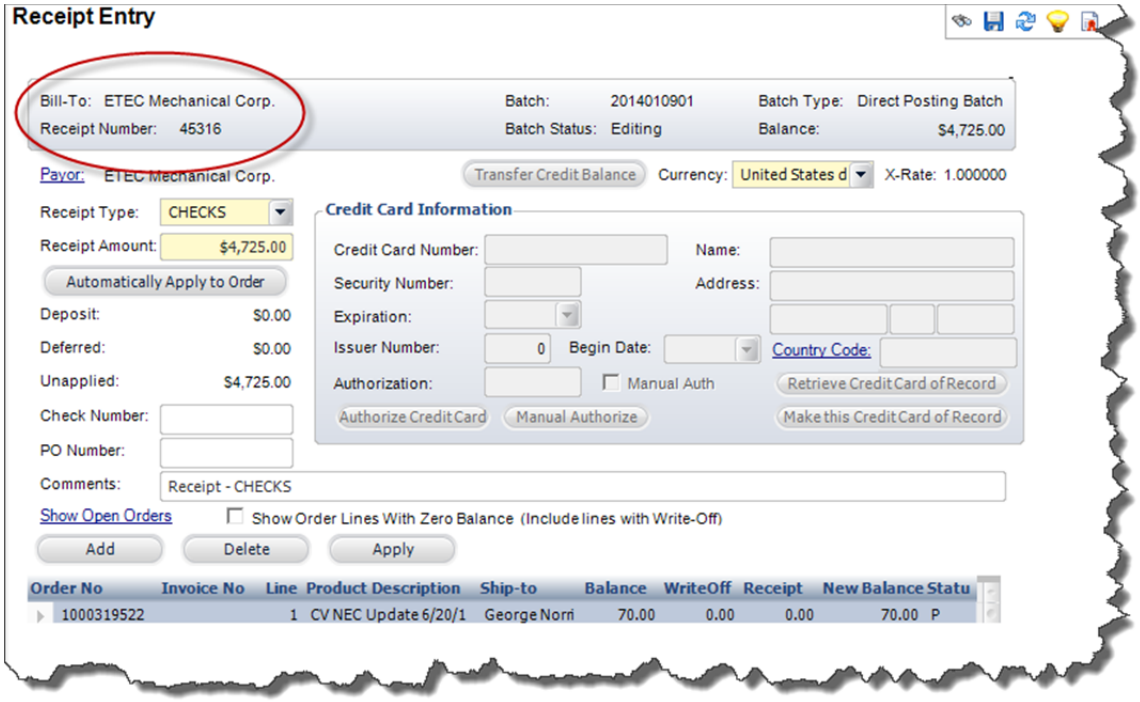


Q: Can I spread out one payment across several meeting orders?

A: Receipt Entry Screen allows you to apply a single payment to multiple orders for an event. If a company pays for multiple meeting registrations, spread out across separate orders, with a single check, you can pay all of them as long as the bill-to is the same company.

In Receipt Entry, enter the Bill-To customer ID and you will see all open invoices for that customer in one screen. This screen allows you to choose which lines to apply payment to (and which to not apply payment).


Receipt Entry
Create Receipt for a Customer
Create Receipt for an Order
View / Edit Receipts
Search Parameters
Customer ID :
0
Name :
etec
City :
State :
Phone/Email:
Search
Create New Receipt
Reset
1 record(s) found ...
Payor Label Name
Primary Job Title
Address 1
City
State
ETEC Mechanical Cor
-
3117 Norfolk St.
Richmond
VA


Receipt Entry
Bill-To: ETEC Mechanical Corp.
Receipt Number: 45316
Batch: 2014010901
Batch Status: Editing
Batch Type: Direct Posting Batch
Balance: $4,725.00
Payor: ETEC Mechanical Corp.
Transfer Credit Balance
Currency: United States d
X-Rate: 1.000000
Receipt Type: CHECKS
Receipt Amount: $4,725.00
Automatically Apply to Order
Deposit: $0.00
Deferred: $0.00
Unapplied: $4,725.00
Check Number:
PO Number:
Comments: Receipt - CHECKS
Credit Card Information
Credit Card Number:
Name:
Security Number:
Address:
Expiration:
Issuer Number: 0
Begin Date:
Country Code:
Authorization:
Manual Auth
Retrieve Credit Card of Record
Authorize Credit Card
Manual Authorize
Make this Credit Card of Record
Show Open Orders
Show Order Lines With Zero Balance (Include lines with Write-Off)
Add
Delete
Apply
Order No
Invoice No
Line
Product Description
Ship-to
Balance
WriteOff
Receipt
New Balance
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1000319522
1
CV NEC Update 6/20/1
George Norri
70.00
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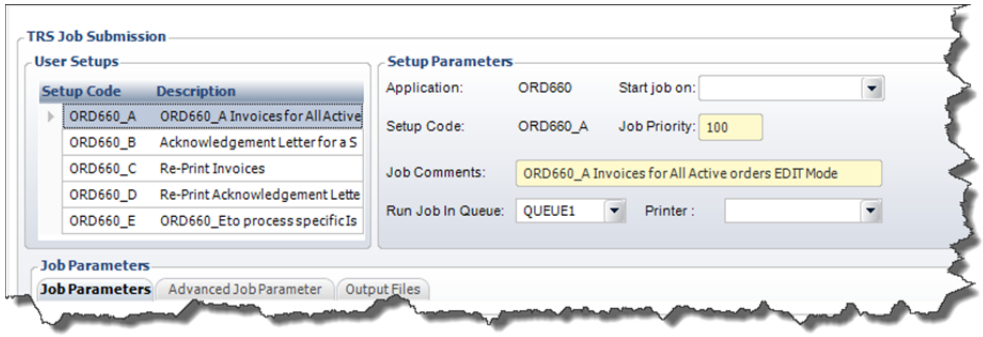
70.00
P

Generating Invoices w/Ord660

ORD660 is a batch process that generates invoices and acknowledgement letters, either individually from the Order Entry screen or in a batch. The ORD660 report now prints a confirmation letter for meeting attendants.
ORD660 includes multiple setup options:

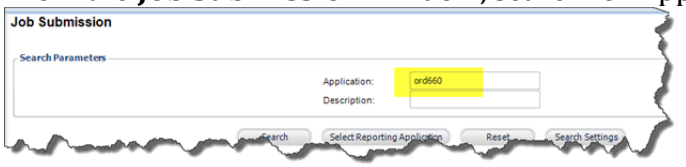
- ORD660_A – Generates invoices for all active orders
- ORD660_B – Generates acknowledgement letters for a specific meeting
- ORD660_C – Reprints invoices
- ORD660_D – Reprints acknowledgement letters
- ORD660_E – Processes specific issues



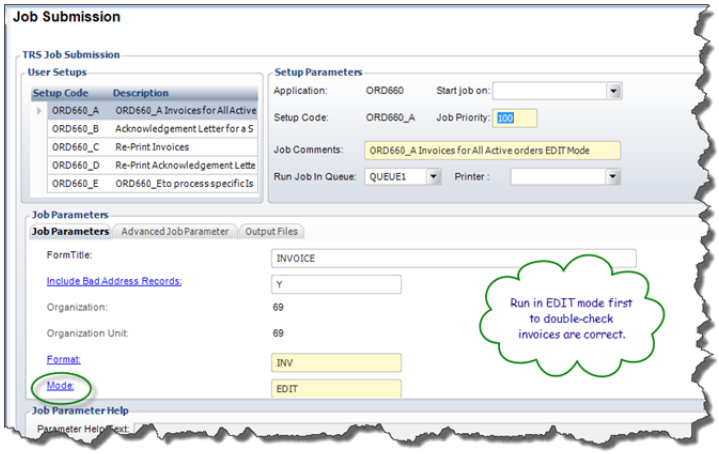
ORD660_A: Generate Invoices for all Active Orders

This process let you run invoices on all your active meeting or membership products.

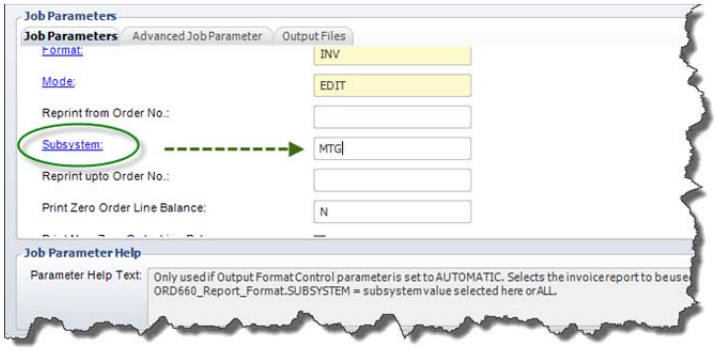
1. From the **Home Page**, click **Run a batch/TRS** job from the **Analytics** grid.
2. From the **Job Submission** window, search for Application: **ORD660**



3.
4. The TRS Job Submission window appears.
5. Complete all necessary fields
6. Click '**OK**'.

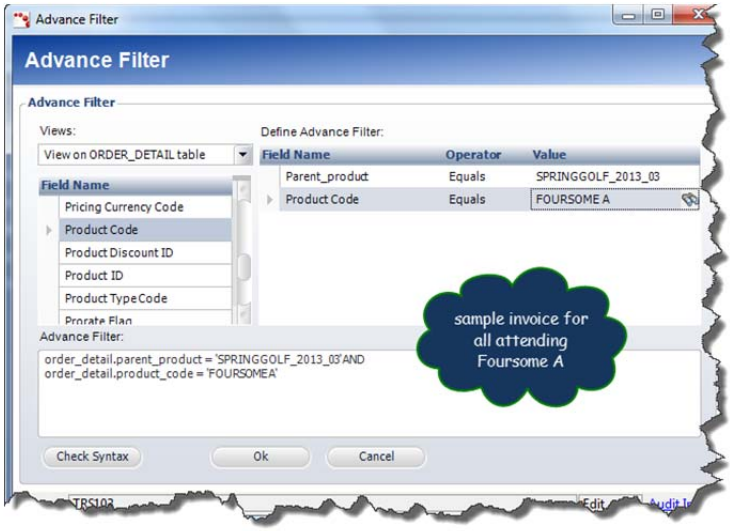


ORD660_A: Generate Invoices for all Active Meeting Orders



ORD660_A: Generate Invoices for a subset of Active Orders

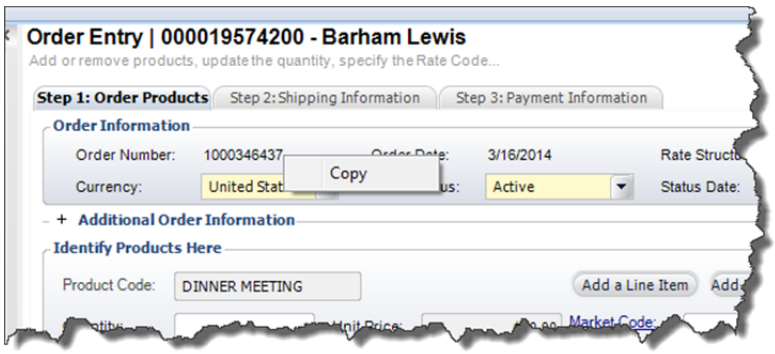
This process let you run invoices on a small subset of invoice(s).

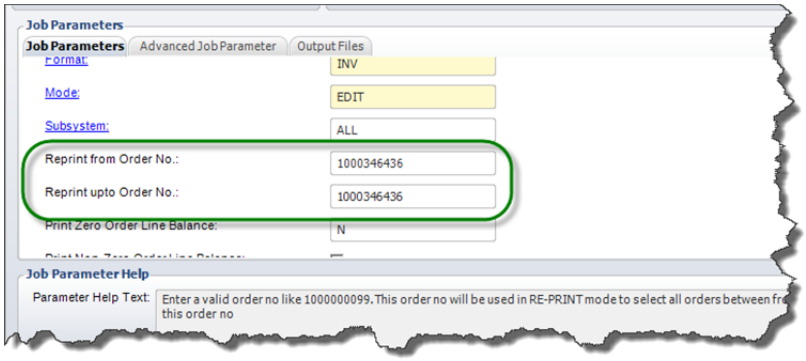


IF FILTERING BY PARENT AND PRODUCT CODE, THERE'S REALLY NO NEED TO CHANGE THE SUBSYSTEM TO MEETING ON THE JOB PARAMETERS TAB.

ORD660_A: Generate Invoices from the Order No.

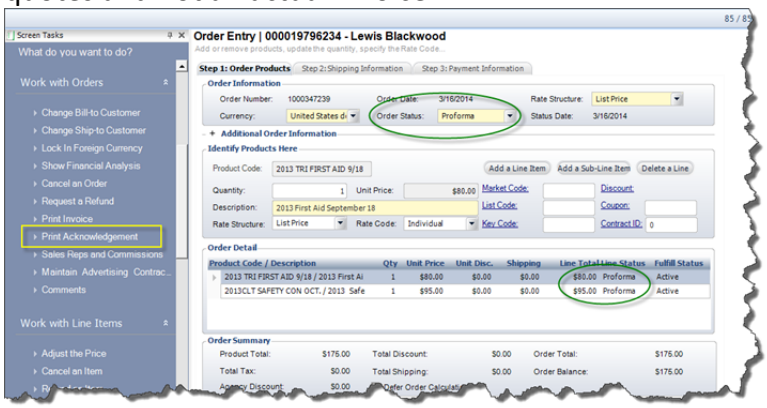
This process let you run invoices on a particular order number(s).



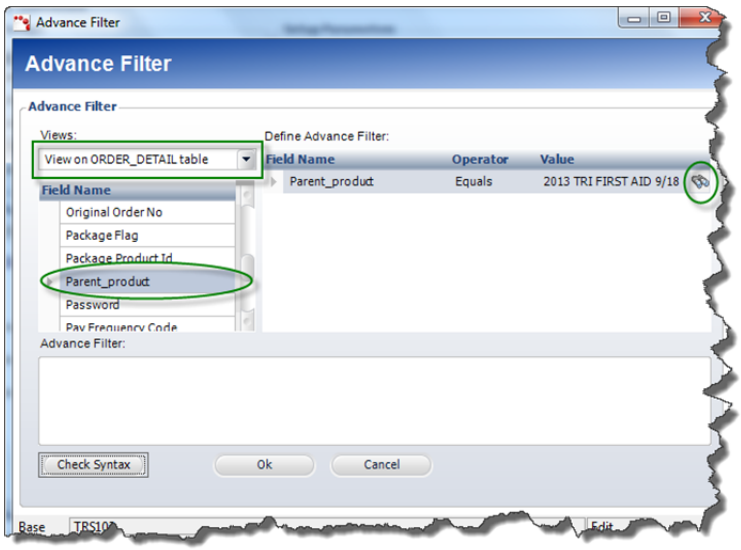


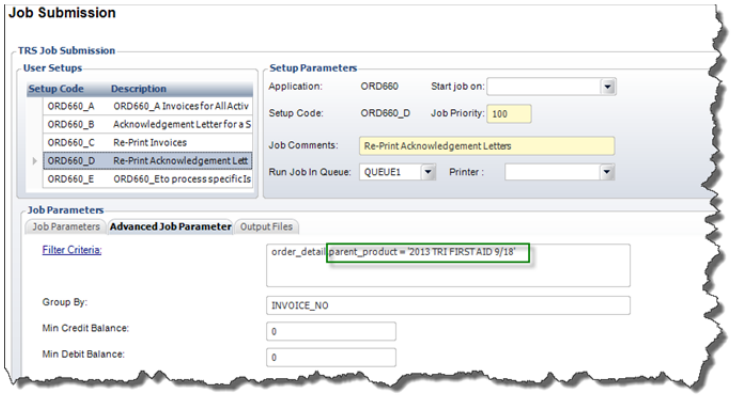
ORD660_B: Generate an Acknowledgement from the Order Entry Screen

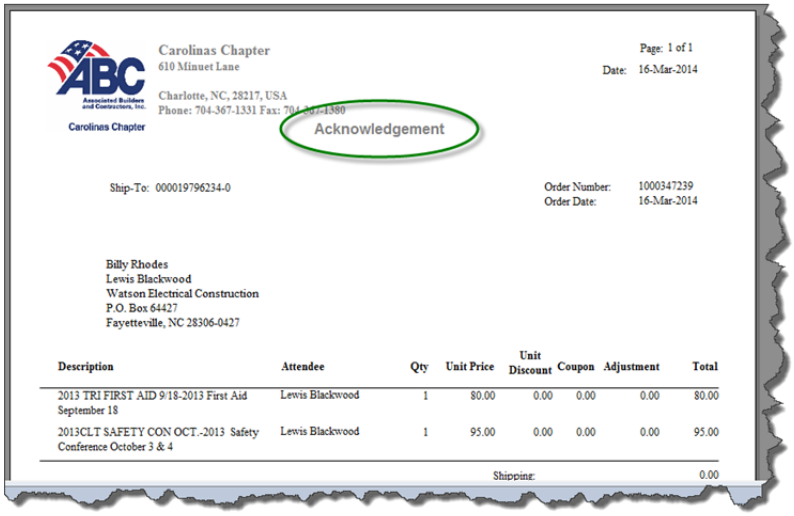
This process let you run an acknowledgement, also known as a confirmation; as long as an order has a line status of Proforma, you can print acknowledgements. These are considers quotes and not an actual invoice.



ORD660_B : Generate an Acknowledgement from the Advanced Job Parameter





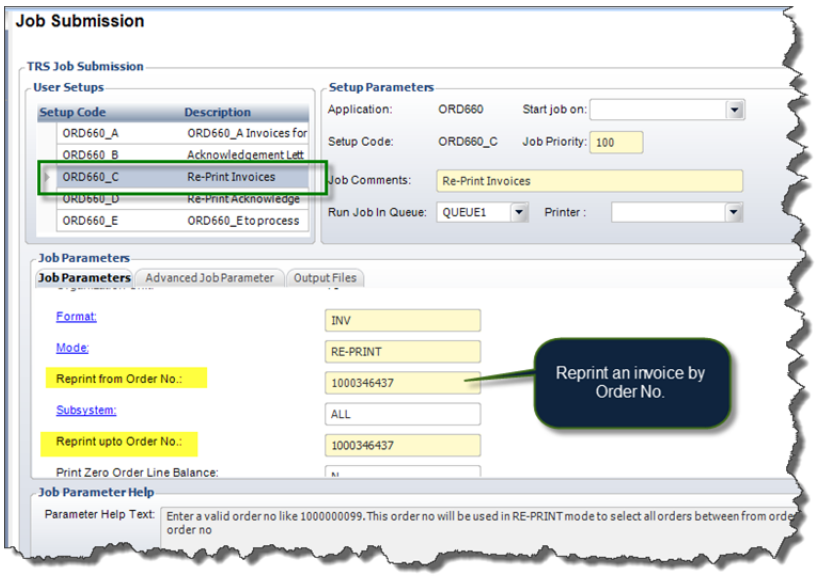


ORD660_C: Re-print Invoices for all Active Orders

This process let you run invoices on all your active meetings or memberships.

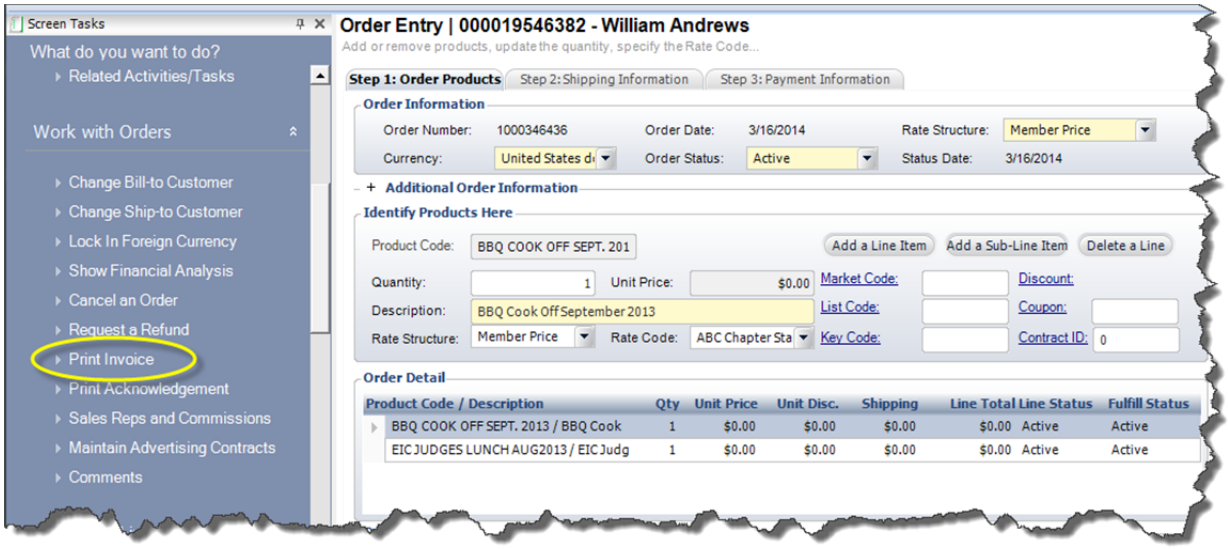
ORD660_C: Re-print an Invoice by Order No.

This process let you run invoices on all your active meetings or memberships.



Generate an Invoice from the Order Entry screen

This process let you run an individual invoice from the constituent order entry screen.



INVOICES CAN ONLY BE PRINTED WITH A LINE STATUS OF 'ACTIVE', IF LINE STATUS IS PROFORMA, YOU MUST PRINT AN ACKNOWLEDGEMENT!